Board of Trade Journal

Volume 188, No. 3540 Published by Her Majesty's Stationery Office 22 January 1965

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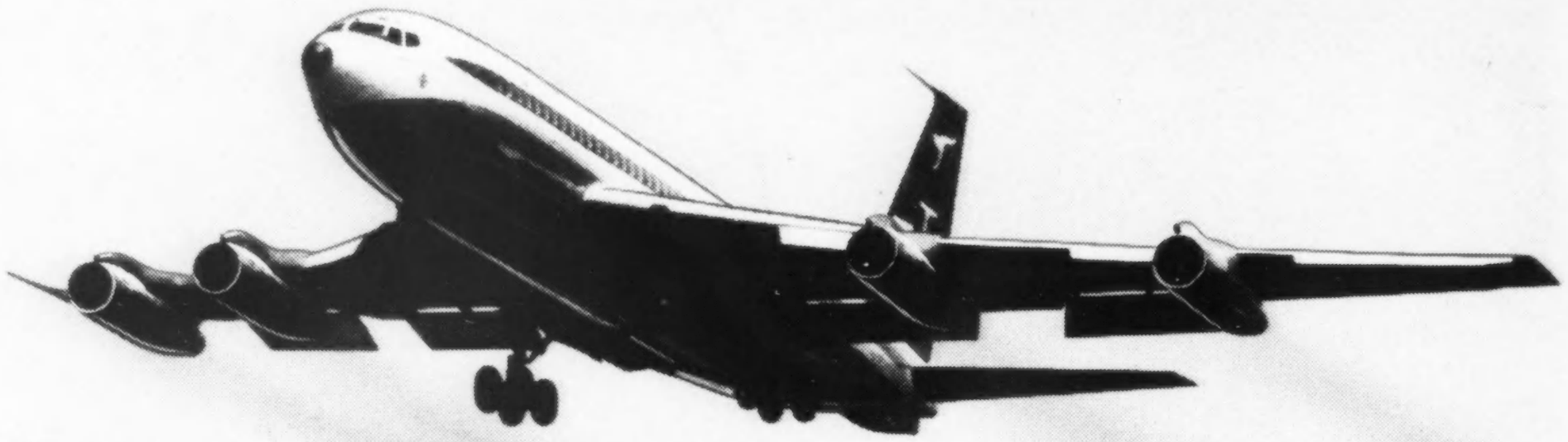

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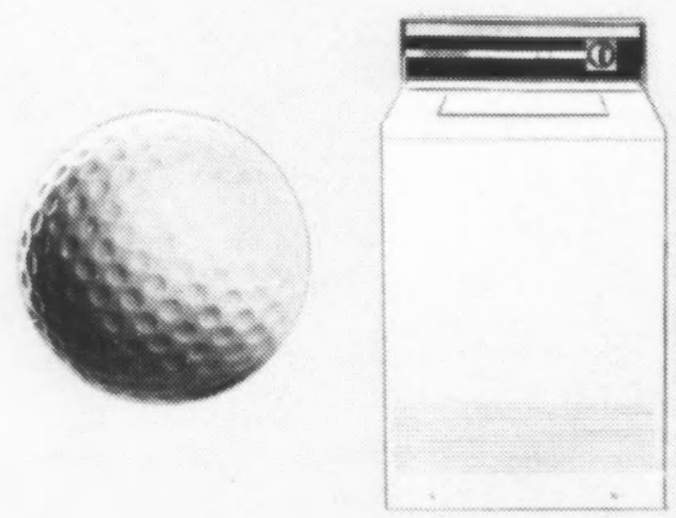

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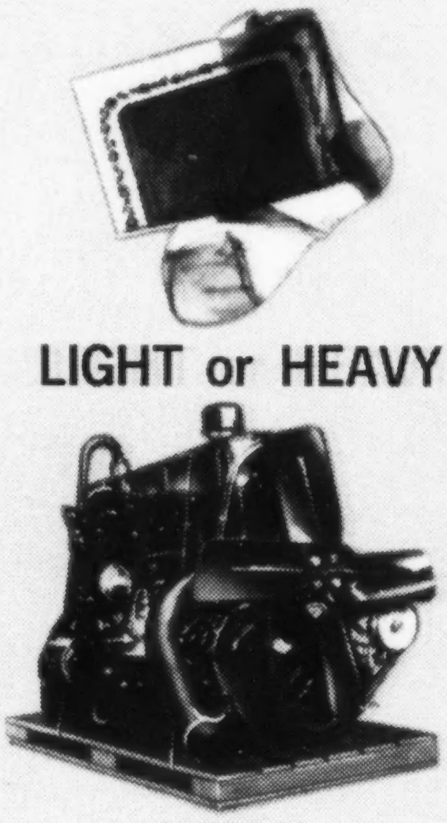

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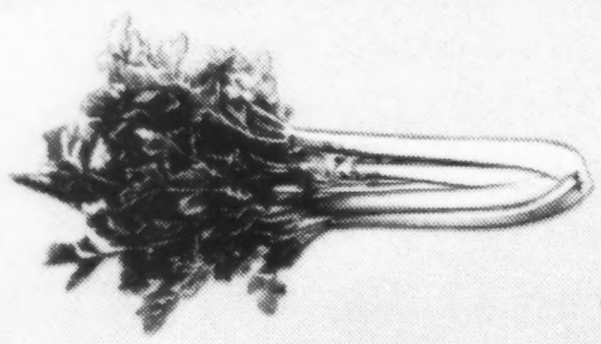

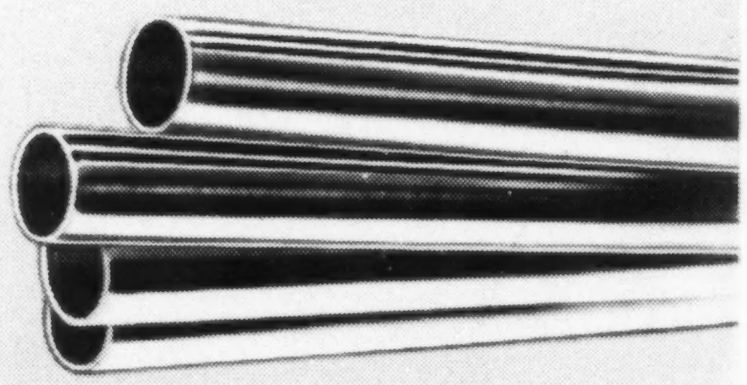

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VOLUME 188, NO. 3540, PAGES, 145-192
22 JANUARY 1965
PRICE 1*s.* 6*d.* NET, SUBSCRIPTION INCLUDING POSTAGE £4 12*s.* 6*d.*

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Front cover photograph

Children the world over now play the games made famous by John Waddington Limited of Leeds illustrated on the cover. In 1965 export sales are expected to reach £200,000, twice the figure reached in 1964. Export manager Keith Stewart returned from a European tour last month with a full order book and now plans a round-the-world-trip in April, calling on buyers in 15 countries. John Waddington's new range of games and toys can be seen at the Brighton Toy Fair which opens on January 31. European buyers will have a chance to see these at the Nuremburg and Lyons Trade Fairs in February.

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The *Board of Trade Journal* is published weekly by HM Stationery Office, price 1s. 6d. (annual subscription £4 12s. 6d. including inland or surface but not air postage) and is obtainable directly from the following addresses: York House, Kingsway, London, W.C.2: 423 Oxford Street, London, W.1; 13A Castle Street, Edinburgh, 2; 39 King Street, Manchester; 35 Smallbrook, Ringway, Birmingham, 5; 109 St. Mary Street, Cardiff: 50 Fairfax Street, Bristol, 1; 80 Chichester Street, Belfast; or through any bookseller.

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Subscriptions and sales inquiries should be addressed to the publishers at any of the above addresses.

Editorial communications should be addressed to the Editor, *Board of Trade Journal*, Room 227A, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877, Ext. 2654).

The views expressed in contributions to the Journal emanating from other than official sources are not necessarily those of HM Government.

Advertisements. Inquiries from the London Postal Area concerning the insertion of advertisements should be addressed to HM Stationery Office, Room D.94, Atlantic House, Holborn Viaduct, London, E.C.1. (City 9876, Ext. 147). Inquiries from other parts of the United Kingdom should be addressed to Cowlishaw and Lawrence (Advertising) Ltd., Memorial Hall Bldgs., 16 Farringdon St., London, E.C.4. (Tel. City 3718).

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Reprints of articles. Reprints from the *Board of Trade Journal*, which should be ordered within one week of publication, cost £3 0s. 0d. per page (or part) for 250 copies. (Larger quantities 5s. 0d. per page for each additional 125 copies).

Orders for reprints should be addressed to the Director of Publications (P.12), H.M. Stationery Office, Atlantic House, Holborn Viaduct, London, E.C.1.

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Awakening Ethiopia beckons British exporters and investors

By N. G. S. BECKETT,
First Secretary (Commercial),
British Embassy,
Addis Ababa

His Imperial Majesty Haile Selassie I and HIH the Crown Prince visiting the cotton estates of the Tendaho Plantations share company in the Awash Valley. With them are officials of Mitchell Cotts and Company, who are in charge of the management of the Estates.

Photo: courtesy of the Imperial Ethiopian Government Ministry of Information.

The following introduction has been contributed by H.E. Haddis Alemayehou, the Imperial Ethiopian Ambassador in London

Modern economic and social development is a relatively new concept and planning is a new phenomenon in the history of one of the oldest nations of Africa. In 1957 *Ethiopia chose a new approach to the improvement of her economic and social conditions, namely, the establishment of long-term targets of economic and social development and working towards the implementation of systematically worked out economic plans designed to accelerate progress in all aspects affecting the Ethiopians of today.*

The First Five-Year Plan (1957-1961) *defined the overall economic and social policy of the country and measures were taken for the creation of institutions necessary for the anticipated growth of economic activities. Increased attention was given to the development infrastructure prerequisite to a modern society. Education was given its due place, more attention was also placed on the training of technical personnel. During this period agriculture was recognized as the basis for Ethiopia's economic growth and industries were established designed to utilize the existing agricultural wealth of the country.*

Before industrialization could become a reality heavy investments had to be directed towards the exploitation of Ethiopia's hydraulic potentials, ports, harbours, telecommunication system and road transport.

The current Second Five-Year Plan has also its targets in harmony with the overall long-term plans of developing Ethiopia. There is a wide scope for economic, social and technical co-operation in these long-term development plans which would benefit both Ethiopian and foreign investors.

Today the investment climate in Ethiopia is excellent. Opportunities in such fields as prospecting and exploiting mineral resources, building, timber, steel, meat, etc., are great. New investment laws provide generous terms to individual investors.

N. G. S. Beckett

GIBBON, the author of the 'Decline and Fall of the Roman Empire' wrote of this country 'Ethiopia slept for a thousand years, forgetful of the world by which it was forgotten'. Ethiopia, so long a backward and forgotten country, is now fast awakening; but it is still very little known to British firms.

Ethiopia is the oldest independent country in Africa and its Emperor traces his descent from the union of King Solomon and the Queen of Sheba. English is the second official language (the first being Amharic). The heart of the country is the central plateau including the capital Addis Ababa, a city of half a million inhabitants poised at 8,000 feet above sea level. In the rest of the country rich arable and pastural land alternates with vast desert plains and thick rain forests. Its natural resources are as yet little explored.

At present the population, estimated at 21 millions, is 90 per cent agricultural. Cattle and sheep rearing is the main occupation but coffee, cotton, sugar and cereals are extensively cultivated. Coffee is the main export product. Minerals have so far been little exploited, but the extensive potash deposits near the Red Sea coast will soon be a rich source of revenue. Of industry proper the greatest development has been in textiles and in hydro-electric power, of which Ethiopia has rich resources.

Signs of Ethiopia's awakening are the ambitious projects under the Second Five Year Development Plan, the extensive investments being made in basic utilities and in agriculture and the increasing attraction of manufacturing industry for foreign investors. Two recent developments are of particular interest, the entry of British banking into Ethiopia and the inception of a television service on November 3 under the management of British experts. Addis Ababa is also attracting now as the unofficial capital of Africa, having been chosen as the headquarters of the 'African Parliament', the Organization of African Unity, as well as the African branch of the United Nations, the Economic Commission for Africa.

Britain's trade with Ethiopia is small relative to that with some other African countries, but the quickening pace of development here gives hope of a substantial increase if we are alive to the opportunities. Our exports to Ethiopia in 1963 totalled about £2·9 million and our imports to just under £2 million. Our exports consist of engineering

The Tis Issat Falls on the Blue Nile. Ethiopia, with its many mountains, has some of the richest resources of water power in Africa.
(Photo: Kaldecsovics, courtesy Ethiopian Tourist Organization)

goods, vehicles, chemicals and various consumer goods and imports of oil seeds, hides and skins, pulses, vegetables and coffee. However, our trade targets for the future will change as development proceeds bringing new requirements and superseding old ones e.g. with the local manufacture of many goods previously imported.

The first target in the coming years is likely to be capital equipment required for the extensive development plans. Some of this is bought with World Bank or I.D.A. finance, others with finance provided by individual countries – e.g. U.S.A.I.D., – while many other projects are covered from Ethiopian budgetary revenues or those of autonomous agencies. In most cases invitations to tender for large contracts are published and reproduced in the Export Services Bulletin of the Board of Trade, and in some cases – notably telecommunications equipment – contracts are not published but tenders are invited from leading suppliers. The principal public and semi-public authorities are as follows:

***Ethiopian Electric Light and Power Authority* (*E.E.L.P.A.*)**

Control about three-fifths of electricity production in Ethiopia and issue public invitations to tender for the most important power plant contracts, mainly with World Bank finance. This is untied and a close watch for opportunities to tender should prove rewarding to British firms.

***Imperial Highway Authority* (*I.H.A.*)**

Award contracts for road-building under a continuing programme financed by World Bank loans and U.S.A.I.D. Are also customers for contractors plant, bridging etc.

Civil Aviation Administration

Responsible for airports and airport equipment; the latter has hitherto largely been supplied by U.S.A.I.D. on long term credit.

Ministry of Defence

Separate branches of this Ministry contract for equipment for the Army, Navy and the Air Force, sometimes by public tender. The Ports Authorities for Assab and Massawa usually order their own requirements.

Ethiopian Tobacco Monopoly

Manufacture, import and distribute cigarettes, cigars and tobacco. Some British makes are sold on a large scale; the competition is mainly American.

National Coffee Board

Responsible for supervising coffee production. Would like to set up modern processing plants but are short of funds.

Central Medical Stores

Purchase all supplies for hospitals.

Ministry of Posts, Telegraphs and Telephones including the Imperial Board of Telecommunications of Ethiopia

Ethiopian Air Lines

The above have a list of about 8,000 items which can be procured in Europe, covering not only aircraft equipment proper but such items as toilet paper and office requisites.

Among the items not obviously covered by the above are *industrial plant* required in connection with the setting up of new factories, and all the *ancillary equipment* required for new industrial plants and public buildings such as hotels, hospitals and ministries, of which a considerable programme is on hand. *Prefabricated buildings* also offer a market in the above connection, at present mainly for public buildings, but later probably in connection with low cost housing which is at present only in the planning stage. Equipment in demand for established Ethiopian industries includes coffee processing plant, cotton ginning machinery, textile machinery in general and power plant. *Well drilling equipment* and pumps for water supply should offer a future market as there are severe shortages of water in outlying areas. *Printing machinery* is a promising field for the future; British firms have recently secured valuable orders for the re-equipping of the official Government Printing Press. As printing and publication are in their infancy this field seems bound to give scope for expansion. German, American and Swiss firms offer keen competition, however. The market for *agricultural machinery and tractors* (as also for *agricultural chemicals*) is small at present, but offers hope of great expansion when the promised agricultural revolution takes place. At the present time such goods are sold only to the large foreign owned plantations and state experimental farms. The market for *motor vehicles* could be expanded if more attention were paid to marketing and agency requirements. This applies both to passenger and commercial vehicles. At present German and Italian vehicles dominate the market, except for utility vehicles where the British Land Rovers are ubiquitous. There is a probability of local manufacture of commercial and utility vehicles in the near future. *Shop fitments* particularly for self-service stores (see below).

The market for consumer goods will suffer a sea-change as Ethiopia industrializes, but will not disappear. Some imports will no longer be required, but others may be imported in increasing quantities as industrialization raises the present low level of purchasing power. The signs of change can already be discerned in merchandising organization and in some surprising manifestations of consumer purchasing power. Under the first heading is the spread of self-service stores, particularly in the foodstuffs field, with the threatened eclipse of the retail grocers who only a year or two ago were riding a wave of prosperity. (This, incidentally, has created a new market for shelving and other store equipment). The second example is the surprisingly brisk demand for TV receivers, particularly the most expensive models, after Ethiopian television was inaugurated on November 3.

Some promising lines in the consumer goods field are:

Woollen textiles

Although the textile industry is well developed it is mainly cotton cloth which is produced. There are interesting openings for woollen suitings to tailors and drapers here as well as for uniform cloth for the armed forces. And although the first woollen mill is now coming into production there should still be a good market for wool textiles and knitwear as purchasing power increases.

Processed foodstuffs

These sell well today and seem assured of a continuing market. So far the only large scale production is of refined sugar from the Dutch sugar estates and a limited variety of boiled sweets.

Pharmaceuticals and medical supplies

These are at present almost entirely imported and imports will probably continue on a large scale, although a British firm has recently set up the first pharmaceutical factory in the country.

Soaps and detergents

There is a good market at present which is likely to expand with purchasing power, although this is certainly a field in which local manufacture is likely to happen. At present there is a small scale production of the commoner type of soap.

Television equipment and similar

Although the new television service is to be equipped with Dutch broadcasting equipment, British as well as Dutch receiving sets are on the market and there is an obvious possibility of expansion.

Office equipment

There is a developing market for the smaller business machines as

Rothmans cigarettes being unloaded from an Ethiopian Airlines plane in Ethiopia. Rothmans are one of the largest selling brands in Ethiopia, and are distributed by the Imperial Ethiopian Tobacco Monopoly.

Photo: courtesy of Messrs. Moenco, Addis Ababa

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(Photo-Servos, courtesy Ethiopian Tourist Organization)

business organization develops here – e.g. with the growth of self-service stores mentioned elsewhere. Stationery, filing cabinets, carbon paper etc., also offer a steady market.

Among the *unprofitable lines* for the future are in the first place those goods which the Ethiopians are bound to manufacture for themselves or which they can import more cheaply from e.g. Japan or India. These include the commoner kinds of textiles and such items as transistor radios in which the Japanese have achieved almost a monopoly of the market.

The second category of lines which will be unprofitable for some time are goods which are too sophisticated for the present level of industrialization or the present quality of demand. These include for example electronic computors, (although IBM computors have been installed by a few very large organizations, i.e. the Imperial Highway Authority, the Ethiopian Electric Light and Power Authority and Ethiopian Air Lines); also special purpose factory machinery, in view of the fact that the engineering industry in Ethiopia is practically non-existent. However, as British or other firms decide to set up such industries in Ethiopia, the situation will obviously change.

This leads to the point that Ethiopia is also a very promising field for many types of investment. The new Investment Law issued in 1963 offers inducements to new industries by way of duty free import of equipment and buildings, and a five year tax holiday on profits, as well as a guarantee of unrestricted transfer of profits, dividends and the incomes of foreign personnel. So far the only substantial British investments have been in cotton and meat production and in the field of banking; a British group is participating in the Addis Ababa Bank, the first private bank to open in Ethiopia, under the new banking law of 1963 and which commenced operations in October 1964.

One should also mention the scope for services of various kinds. A leading British firm of consulting engineers is carrying out an extensive series of surveys of Ethiopian resources, under contract to the Ethiopian Government, partly financed by British technical assistance funds. British insurance companies have active agents here and there may of course be scope for further participation in the banking field. Three British firms of registered accountants are operating.

There are advantages and attractions in this market as well as certain difficulties which must be pointed out. The general atmosphere is very favourable for the entry of British firms to the market, both by trading and investment. There are some restrictive attitudes (e.g. banks, though not commercial and industrial enterprises, must have a majority Ethiopian shareholding) and there is some pressure on businesses to employ Ethiopian staffs, but this does not apply to newly established industrial enterprises. There is very little xenophobia and the feeling towards Britain is as friendly as to any other country. This is partly because of Britain's role in the liberation of Ethiopia in 1942 and partly because many leading Ethiopian officials have studied in Britain. English is the second official language, and this should offer an advantage to British firms who are quoting or tendering for business here. The general economy of the country has shown encouraging stability, as has been recognized in the reports of such bodies as the International Monetary Fund and the World Bank. Moreover, Ethiopia is a free trading country with no import licensing restrictions, although exchange control is maintained to prevent the export of capital, and as in most under-developed countries high tariffs are maintained for revenue purposes.

Among the difficulties of the market is the comparatively backward development of trading organization which makes it difficult to find suitable agents, although this is an essential for the securing of worth-while business. For engineering the choice is very limited. An engineering agency has to be confined either to one of the dozen big import merchants who already hold many agencies or to a small concern which may not be able to handle the agency properly and may require support in the form of capital and expertize. For consumer goods there are only a few commission agents, most consumer goods being sold by retailers who also act as importers and agents; this obviously limits the number of outlets which can be reached. Among the difficulties must be mentioned the keen competition in many lines, increasingly from Japan in consumer goods and from the United States, Germany and Italy for capital goods.

The first thing which British firms interested in Ethiopia should do is to make a serious examination of the possibilities of this country, both for exports and investment; as according to the goods concerned, there may be a promising import market or there may be a future for British participation in local manufacture. An inquiry of the Board of Trade or the Commercial Department of the British Embassy should elicit the basic information which if the prospects appeared promising could be followed up by a visit, probably in conjunction with a tour

(*Continued on page* 152)

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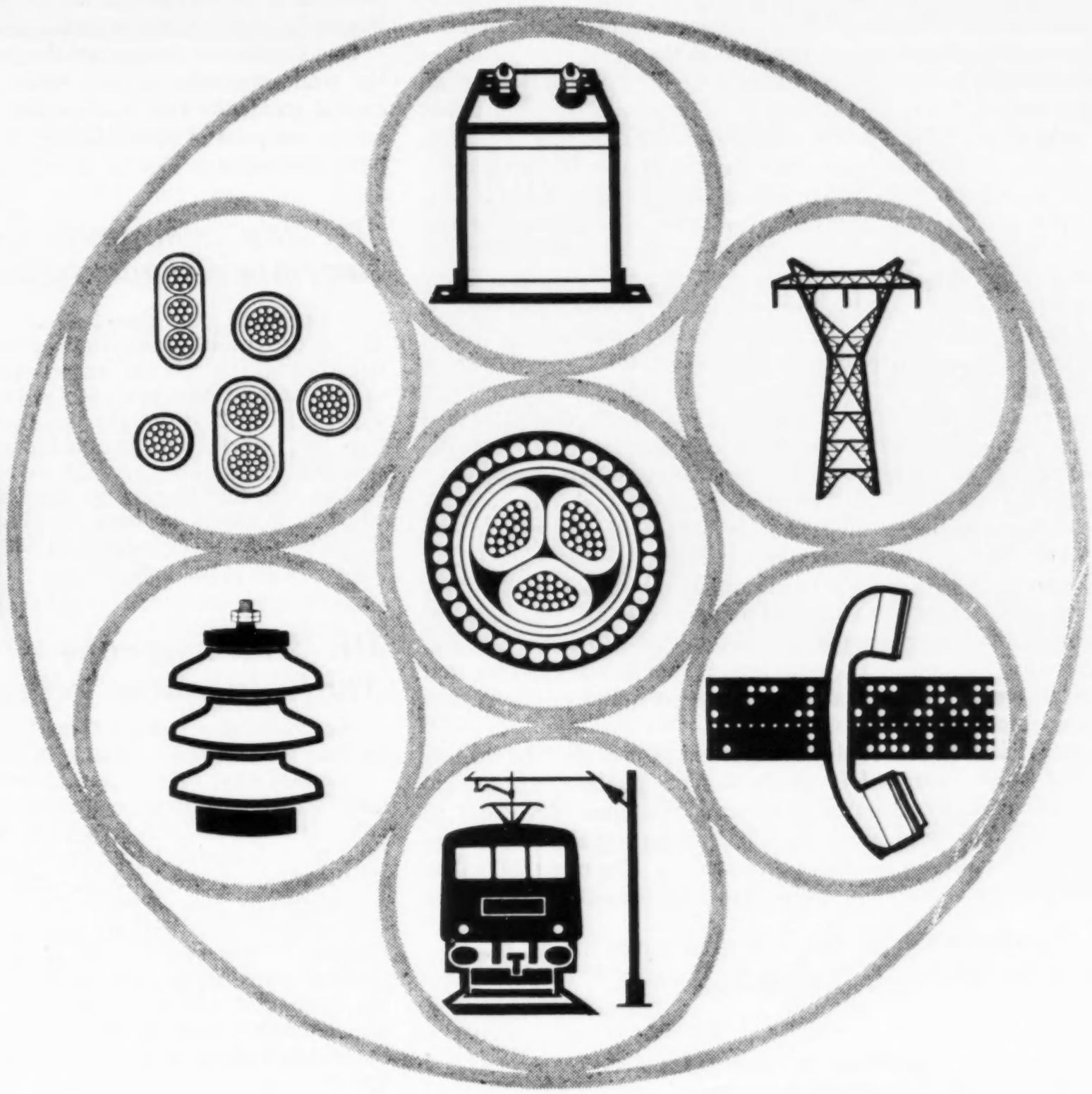

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of neighbouring East African or Middle Eastern countries, the practice usually followed by British firms interested in this area.

Having ascertained that there is a market, the appointment of an agent is the essential next step, although as explained above it is not an easy proposition. The Commercial Department is ready to help also, but it is probably essential for a representative of the firm to come to Addis Ababa to make the actual appointment. Incidentally, it is almost essential for the agent to be located in Addis Ababa, which is by the far the largest population centre (nearly 500,000 inhabitants as compared with 120,000 in Asmara, the second largest town). Some firms have found it advantageous to establish a subsidiary company, branch office or resident representative in Addis Ababa.

Once established in the market, there are certain essentials for its successful exploitation. In the field of public contracts, it is most important for high level representatives from headquarters to visit Ethiopia from time to time to make direct contact with the contracting authorities; the goodwill garnered by personal contact is inestimable. Attention to correspondence and respect of promised delivery dates are most important points to which British firms engaged in the market could be well advised to pay careful regard. Adequate and attractive catalogues and sales literature are very important; one leading contracting authority recently complained of the inferiority of British catalogues as compared with German and American. A complaint received in the consumer goods field is that British, and for that matter US as well, firms are often reluctant to quote c.i.f., whereas their leading competitors do so.

Great investment on advertising is regarded as necessary by leading importers of British goods. The media of press publicity are limited to a few daily papers and monthly reviews, but since November 16 advertising time has been available on Ethiopian television at very attractive rates, as also on the radio programmes. The monthly British Trade and Economic Bulletin, which has been issued by the Commercial Department since last October, endeavours to assist in publicizing British goods, while the Information Department of the British Embassy is also able to assist with publicity in many ways.

One should not exaggerate the present size of the Ethiopian market; the trade statistics quoted below put it in perspective. Except for capital goods for the development programme, the market is limited, but as the pace of economic development increases those firms which have secured their place in this market should reap a rich reward.

ETHIOPIAN TRADE STATISTICS (000 E$)

(a) Total foreign trade

	Imports	*Exports*
1962	257,035	196,196
1963	276,147	219,454

(b) Principal suppliers

	1962	1963
Italy	40,053	44,415
Japan	35,725	37,464
United States	46,400	34,372
W. Germany	23,452	30,320
Great Britain	18,176	25,037
India	11,516	10,855

(c) Principal markets

United States	77,565	83,498
Italy	19,300	19,141
Aden	12,248	13,212
Saudi Arabia	8,455	11,295
Great Britain	10,121	9,660
Yugoslavia	4,500	8,813
Japan	3,865	8,267
W. Germany	5,920	7,965
French Somaliland	6,859	7,128

(d) Principal imports into Ethiopia

	Value 000 *E$* 1962	1963
Industrial machinery and apparatus	29,953	14,478
Metals and metal products	17,254	22,481
Motor vehicles	16,718	22,406
Petroleum and petroleum products	22,903	18,424
Cotton textiles	22,515	19,521
of which:		
Piece-goods	17,859	13,859
Yarn and thread	8,656	5,662
Cotton clothing and blankets	8,797	11,122
Rubber tyres and tubes	8,221	8,224
Silk and art silk fabrics	6,976	7,433
Drugs and medicines	6,115	7,066
Motor vehicle parts	6,714	6,835
Electrical machinery and appliances	6,556	6,714
Telecommunication equipment	1,898	6,650
Aircraft and parts	28,303	4,703
Paper and manufactures and books	4,398	5,673
Soap	3,567	4,783

Mr. Jay comments on the December trade figures

MR. DOUGLAS JAY, President of the Board of Trade, commenting on the provisional trade figures for December, said: 'I congratulate British Industry on the record level of exports in December. The earlier part of last year was disappointing, but the year ended on a hopeful note. From the spring exports were drifting downwards. For the fourth quarter, however, they showed an encouraging rise and more than made good the ground lost earlier. 1964 has seen a substantial rise in our import bill and sustained further efforts are clearly necessary to keep exports on their upward trend. It is still difficult to judge what effect the temporary import charges are exerting'. (*See page* 161.)

Mr. Mason speaks at Osaka on Anglo-Japanese relations

SPEAKING at a meeting of the Japan – British Society in Osaka on January 14 Mr. Roy Mason, Minister of State (Shipping), Board of Trade said that the Anglo-Japanese commercial treaty, which came into force just over a year and a half ago, was the beginning of the latest and most fruitful stage in the development of trade between the UK and Japan. The liberalization and the increase in quotas that the treaty brought about enabled imports from Japan to rise in the first eleven months of 1964 to £67 million, an increase of 42 per cent over the previous year. He was sure both sides were gratified that an increase of this order could be achieved smoothly without any disruption of British industry, and without any need for the UK to invoke the 'safeguard' clause of the treaty. Outstanding among the successes of Japanese exporters were cameras, which seemed now almost to monopolize the windows of our photographic shops, and light weight motor cycles.

Continuing, Mr. Mason referring to UK exports to Japan said that in the first eleven months of 1964 UK exports totalled £51¼ million, an increase of less than 19 per cent over the same period of the previous year. If we excluded non-ferrous metals, in which there were abnormal and non-recurring features, the increase was less than 11 per cent. This was only about half the rate at which Japanese total imports had been increasing. 'I do not think it is unfair to say that part of the cause is that your liberalization has not made quite the progress that we had hoped, and that some of our important traditional exports such as whisky, confectionery and biscuits are still seriously limited by restrictive quotas. Nevertheless the principal cause undoubtedly lies in the disappointing performance of our exports generally. Although our total imports over the first eleven months of 1964 have risen by nearly 15 per cent our exports have risen by only just over 4 per cent.'

There were great hopes to make British industry truly competitive in export markets, said Mr. Mason. Great Britain had much to learn from Japan in the matter of industrial efficiency. The problem of stabilizing wages and prices however was one which had only just begun to be of concern to Japan.

'We are naturally continuing and in some cases intensifying the conventional export promotion measures. So far as Japan is concerned quite the most important of these are the British Exhibition and the British Fortnight that we are organizing in Tokyo in September. The exhibition will be the largest that we have ever presented overseas, and I believe the largest ever presented in Japan by a Western nation. Its size is of course as much a measure of the interest of British businessmen who are taking space in it as of the enthusiasm of the British Government. There is no lack of interest in Japan among British businessmen. They see and are fascinated by the extraordinary speed and vigour with which your economy is expanding and are conscious of the opportunities for increased trade that this expansion provides. My Government sincerely hopes that by giving Japanese buyers this opportunity to see a really wide range of the products of British industry, the exhibition will help our exports to you to expand as fast as your exports to us,' he added. (*See page* 177.)

Anglo-Japanese talks in London

THE FOLLOWING communique was issued following the talks between HE Etsusaburo Shiina, Foreign Minister of Japan and Mr. Patrick Gordon Walker, Secretary of State for Foreign Affairs, and Mr. Douglas Jay, President of the Board of Trade, in London on January 15:

Mr. Etsusaburo Shiina, Foreign Minister of Japan, visited the United Kingdom from January 14 to 17, for the third round of the regular Anglo-Japanese Consultations. On January 15, Mr. Shiina had talks with Mr. Patrick Gordon Walker, Secretary of State for Foreign Affairs, and with Mr. Douglas Jay, President of the Board of Trade, respectively concerning a wide range of topics of mutual interest to the two countries. The Japanese Foreign Minister also called upon Mr. Harold Wilson, the Prime Minister. Mr. Shiina and Mr. Gordon Walker had talks on various topics including the international situation, concerning China, East-West relations, disarmament, and South East Asia, and economic relations between the United Kingdom and Japan. Mr. Shiina exchanged views with Mr. Jay on various aspects of international trade including the British import surcharge, the United Nations Conference on Trade and Development and the Kennedy Round of tariff negotiations. Mr. Jay explained Britain's present balance of payments difficulties and the means, both short and long-term, by which the Government intends overcoming them.

Before the Ministerial consultations, talks at official level were held to discuss a wide range of problems.

It was agreed that these meetings contributed towards better mutual understanding of each other's viewpoint on problems of common concern. The meetings were frank and cordial and their success reconfirmed the high value of the regular Anglo-Japanese Consultations for the maintenance and further development of good relations now existing between the two countries.

It was agreed that the next round of regular Consultations should take place this year in Tokyo on a date to be agreed upon by both Governments.

Chancellor's call for higher efficiency

'IN THE END it comes down to this: the more efficient we are; the more we sell abroad: the sooner we reduce our overseas deficit; the quicker we can get on with the job at home. In every field we must try to find methods and machinery that will be more efficient and modern. In one field where I have direct responsibility I have given instructions that the Civil Service programme for installing computers in Government departments should be reviewed to see whether by speeding it up manpower and costs can be saved. I ask local authorities, nationalized industries, industry, commerce and everyone else to review all their work processes and their expenditure in order to cut out waste, speed up modernization and become more efficient.' – *Mr. James Callaghan, Chancellor of the Exchequer, addressing the Cardiff and District Chamber of Trade luncheon on January* 15.

British trade delegation to visit Spain

A BRITISH trade delegation sponsored jointly by the Birmingham and London Chambers of Commerce is to visit Spain from January 31 to February 6. The group led by Mr. K. S. F. Corley, president of the Birmingham Chamber of Commerce and a director of Joseph Lucas, Ltd., will visit important industrial and commercial centres including Madrid, Bilbao and Barcelona.

The main aims of the group are to encourage further growth of Anglo-Spanish trade and particularly to look at the long term opportunities for British exports to Spain, and the pattern for licensing and joint venture projects. The delegation will also examine with the Spanish authorities further ways of stimulating trade in both directions, such as a follow-up trade mission or an exchange of business groups later in the year.

Lord Rootes (left) demonstrating the new Singer Chamois to Mr. William Ross, Secretary of State for Scotland, who visited the Rootes Group's factory at Linwood, near Paisley on January 12, *during his tour of Scotland's industries. Mr. Ross was accompanied by Mr. J. Bennett, his Parliamentary Private Secretary; Mr. N. Baird, his Private Secretary; Miss Betty Harvie Anderson, M.P. for East Renfrewshire; and Mr. Norman Buchan, M.P. for West Renfrewshire. The party also included Mr. C. Whitehouse, Controller, Board of Trade, Scottish Region.*

CELA chairman's trade survey of Latin America

SIR BERKELEY GAGE, chairman of the Committee for Exports to Latin America (CELA) and a member of the British National Export Council (BNEC), left London on January 15 for Venezuela on the first stage of a six weeks' fact finding tour for British industry and commerce of Latin American markets. During his visit he will also visit Colombia, Peru and Mexico.

Before leaving on his tour Sir Berkeley said, 'Latin America is in an intensive phase of development and progress. There are many opportunities available for British exporters from which to profit, and it will be my job to stimulate a greater interest in British industry and commerce and to put the opportunities before our exporters on my return.' He emphasized that he used the word 'exports' in a broad sense to cover technical know-how in industry and agriculture and also 'joint ventures'. He believed that the promotion of exports to these countries by British industry should include an understanding of Latin America's problems in development and exports.

The New York Trade Centre

THE BRITISH-AMERICAN CHAMBER OF COMMERCE in New York, whose President is Mr. Joe Eerdmans, is planning an ambitious venture with the strong support of the Committee for Exports to the United States and financial support from the Board of Trade.

A search is now going on for suitable premises in New York where the offices of the Chamber could be combined with a Trade Centre offering display space for British manufactures.

The purpose behind this Centre is not to create merely a showroom for British goods in New York, as this would have only an extremely limited selling value. The purpose is to create a live focus for British exporters in New York as a springboard for 'selling out' British manufactures of all kinds, backed by the services of the Chamber, so that the Centre will not only display British goods but will offer a wide range of advice to exporters and importers about the American markets of New York and the Eastern States.

The Centre's opening date will depend on the speed with which suitable premises can be obtained, but it is hoped that the Centre will be fully operational before the end of 1965.

How the Government can help exporters

'IN SOME 200 of the world's principal trading centres there are commercial officers waiting to answer the questions you want to put to them about exporting to the territory for which they are each responsible. These officers are there to help you, to receive you on your business trips abroad, to advise and support you, to save you time in your crowded itineraries.' This statement was made by Lord Rhodes, Parliamentary Secretary, Board of Trade, at the annual luncheon of the National Association of British Manufacturers, Merseyside Branch, in Liverpool on January 14.

'Among the various ways of increasing, or initiating exports, many firms are making increasing use of international trade fairs. It has long been axiomatic that one of the best ways of selling things is to take them, physically, to the market and show them off to the customer. The Board of Trade helps industry to do this. We have on our lists well over 60 fairs, for the rest of this year, at which in one way or another we have decided, or are proposing, to help British industry to exhibit their goods. We are in addition studying a number of fairs which will take place in 1966 – and not only studying them, but planning for them. If any of you is interested in exhibiting at trade fairs overseas and would like to know more about it – please get in touch with the Board. There are various ways in which we can help a *group* of firms – not, I am afraid, an individual firm – to exhibit at less cost than if they went on their own. This may not be the answer to your export problems; but it is *one* way of testing out a new market or of getting actual orders.'

Lord Rhodes said the Government wanted to help the willing exporter to the best of its ability, consistent with our international obligations, and the President was considering a number of ways of extending the Board of Trade services to exporters. In some 200 of the world's principal trading centres there were commercial officers waiting to answer questions put to them about exporting to the territory for which they were each responsible. These officers were there to help exporters.

The Board of Trade was not the only Government help to exporters: there was the Export Credits Guarantee Department, with an office in Liverpool, and another in Manchester. In the past five years the Liverpool office had built up its business from an annual face value of £13,900,000 to the present figure of £44,400,000. This ECGD expansion was going on all over the country. It had meant a cheapening of its facilities and a widening of their scope. In the last ten years ECGD premiums had been brought down to almost half what they were. But the expansion of business – largely by attracting new policyholders – had not come about merely by cost reductions. The lengthening of credit terms over the past few years had made exporters more conscious of the risks involved. In each of the last two years ECGD had paid more in claims due to the failure of individual buyers than it had paid through political and economic difficulties.

'In spite of many difficulties facing exporters – they are often formidable – let us not make too much of them but go out and accept the challenge to succeed whatever the odds. Government on its part will do all it can to support, stimulate and guide your efforts. But it is industry who must supply the main initiative and energy needed to succeed'.

— **Lord Rhodes**

Looking ahead at future export prospects, Lord Rhodes said we had to take account of the changes in the composition and direction of exports. Engineering goods now accounted for nearly half our total exports. As to direction, Western Europe now took as high a proportion of our exports as the sterling area, increasing from 28 per cent ten years ago to 37 per cent in 1963. In spite of some recent setbacks, Europe was now of greater importance to our export prospects.

'We must look elsewhere too, to the United States, our largest export market with its buoyant conditions, and to Australia where some special efforts are being made to draw attention to opportunities in this our second largest market'.

Sir Wm. McFadzean appeals to exporters to help others export

'I ASK YOU NOT only to be exporters yourselves, but the cause of exporting in others. Convert them, help them all you can, and stop so many people yielding to the temptation to the easy way out of saying nothing can be done until something particular happens such as tax rebates, unclogged docks, or cheap credit.' Sir William McFadzean, chairman of the British National Export Council, made this statement at the Westminster Chamber of Commerce luncheon in London on January 13.

Speaking on the theme 'Let's face the facts', Sir William said that £12 million worth of goods were leaving the country every day of the year, and in this competitive world they were only being bought because they were the goods people wanted and we were selling them hard. 'Why, then, the anxiety? You know the answer only too well – our exports are still not good enough, for our imports have been creating even bigger records. In this situation we obviously have two alternatives – one is to cut imports, the other is to increase exports, without creating in the process a still greater demand for imports – or, in other words, to see that a growing proportion of our growing production goes into exports. In recent years we have been doing the reverse. The proportion of our production we have been exporting has been shrinking – not swelling.'

Continuing, Sir William asked: 'What happens if we fail to remedy this? Let's face the facts. Any country who goes on spending more than it earns is bound to run into trouble. The apparently glorious but wholly unjustified living beyond your means is inevitably followed by the days of reckoning such as face us now.'

People sometimes said that exports depended on our having a buoyant home market. There was some truth in this, but only if it was accepted that a buoyant home market depended in the long run on exports. If anyone in a position to contribute to those exports preferred to get easy sales in the home market, let him face the bitter truth that he was letting the continuance of those easy sales depend on the export efforts of other people.

A good deal was said about the need to provide exporters with incentives. Sir William said he thought that exporters deserved all the incentives they could legitimately and prudently be given, to try to ensure they were meeting competitors in other countries on as equal terms as possible. 'Do not let us minimize the incentives in export trade itself. I know it is hard work, but many firms find that the need to meet foreign competition gives them ideas and forces on them changes that in the end increase their selling power in the home market. I know that the profits to be gained in export tend to be lower than at home – but what a vital contribution export sales make, directly or indirectly, to the results of most progressive British companies. I know exporting can be difficult. but I would wish the thought of what is going to happen if we each fail to do our share would be incentive enough for most people. It is in certain other countries.

'I appeal to you all to help in achieving the vital increase in our export effort.'

Tax rebates for exporters

INQUIRIES about the tax rebates for exporters, details of which were announced by the Treasury earlier this week, should be made to HM Customs and Excise, King's Beam House, Mark Lane, London, E.C.3, or to local Customs offices.

Economic Development Committee for the distributive trades

THE ECONOMIC Development Committee for the Distributive Trades met on January 15 at the National Economic Development Office under the chairmanship of Mr. Hugh Weeks. The Department of Economic Affairs was represented for the first time. The Committee welcomed the actions being taken to discourage increases in prices, and urged that every effort should be made to keep down the cost of living.

The Committee agreed on the following recommendations: (1) An Industrial Training Board for the distributive trades should be set up as a matter of urgency, and a member of the management side of the distributive trades should be appointed to the Central Training Council as soon as it becomes possible; (2) A booklet on stock control in distribution should be prepared for the information of the smaller traders; (3) Capital allowances should be extended to commercial premises.

The Committee also asked the Board of Trade to examine the possibility of setting up Government-sponsored shops overseas to promote the sale of British goods.

The Committee is also undertaking studies of the following: (i) The reasons for the popularity of foreign goods in British shops in recent months. It is hoped that this will lead to suggestions for improving the quality and competitiveness of British consumer goods; (ii) The utilization of labour in different sectors of distribution with a view to finding out where and how the greatest economy of manpower could be achieved.

New factory at Kirkcaldy

THE FIRST major success for Kirkcaldy, Fifeshire, in its drive for new industry was announced on January 14. Babygro Ltd., an associate company of the Canadian firm, Capehart-Honeychile of Toronto, are to build a factory employing between 200 and 300 people for the production of infants' clothing.

Mr. J. H. Barruch, managing director, told a Press conference in Kirkcaldy that the new factory would cover between 30,000 and 40,000 square feet on a four-and-a-half-acre site. It would be additional to the company's existing factory at Glencraig, eight miles away, where 120 people are currently employed and which will continue production. It is hoped to start production at the Kirkcaldy factory by the end of this year. Ninety per cent of the employees will be women.

Institute of Export appoint deputy director

THE INSTITUTE OF EXPORT have appointed Mr. R. C. G. Hunt Taylor as Deputy to the Director, Mr. Alfred J. Townsend. This is a further step in the development programme of the Institute, with a view to playing its full part in the present national re-appraisal of export facilities and techniques.

It will be recalled that Mr. Townsend was awarded the CBE in the New Year's Honours for his services to export.

British trade official on export promotion tour

IN THE ISSUE dated January 8 details were given of the series of meetings sponsored jointly by the Board of Trade and the Export Council for Europe, which are being held in the main industrial centres as a follow-up to the recent British Week in Denmark, and at which Mr. P. D. Stobart, HM Counsellor (Commercial) at the British Embassy in Copenhagen will speak.

The first meeting was held in Bristol on January 19, the second takes place in London January 22. Other meetings are scheduled for January 25 (Newcastle), January 27 (Leeds), January 28 (Birmingham) and January 29 (Cardiff).

Exchange of information on shipping

THE GOVERNMENTS concerned have decided to release the text of the agreement made in Paris on December 15, 1964, for the exchange of information sought by the United States Federal Maritime Commission in connection with maritime freight rates, relating to the inbound and outbound trade of the United States.

The publication of the Agreed Minute on Exchange of Shipping Information fills in details of the outline given in the OECD press communiqué published in the *Board of Trade Journal*, December 25, 1964:

Agreed Minute on exchange of shipping information

As a result of discussions between representatives of the Governments of Belgium, Denmark, Finland, France, the Federal Republic of Germany, Greece, Ireland, Italy, Japan, the Netherlands, Norway, Spain, Sweden, the United Kingdom (referred to collectively as 'the 14 Governments') and the United States of America, it is understood that the following is the procedure to be followed in an exchange of information between these Governments in connection with Foreign Trade Studies envisaged by the Federal Maritime Commission of the United States.

(2) The 14 Governments are willing to use their good offices to facilitate the production of the following statistical information by their shipowners who are members of the conferences listed in Appendix A.

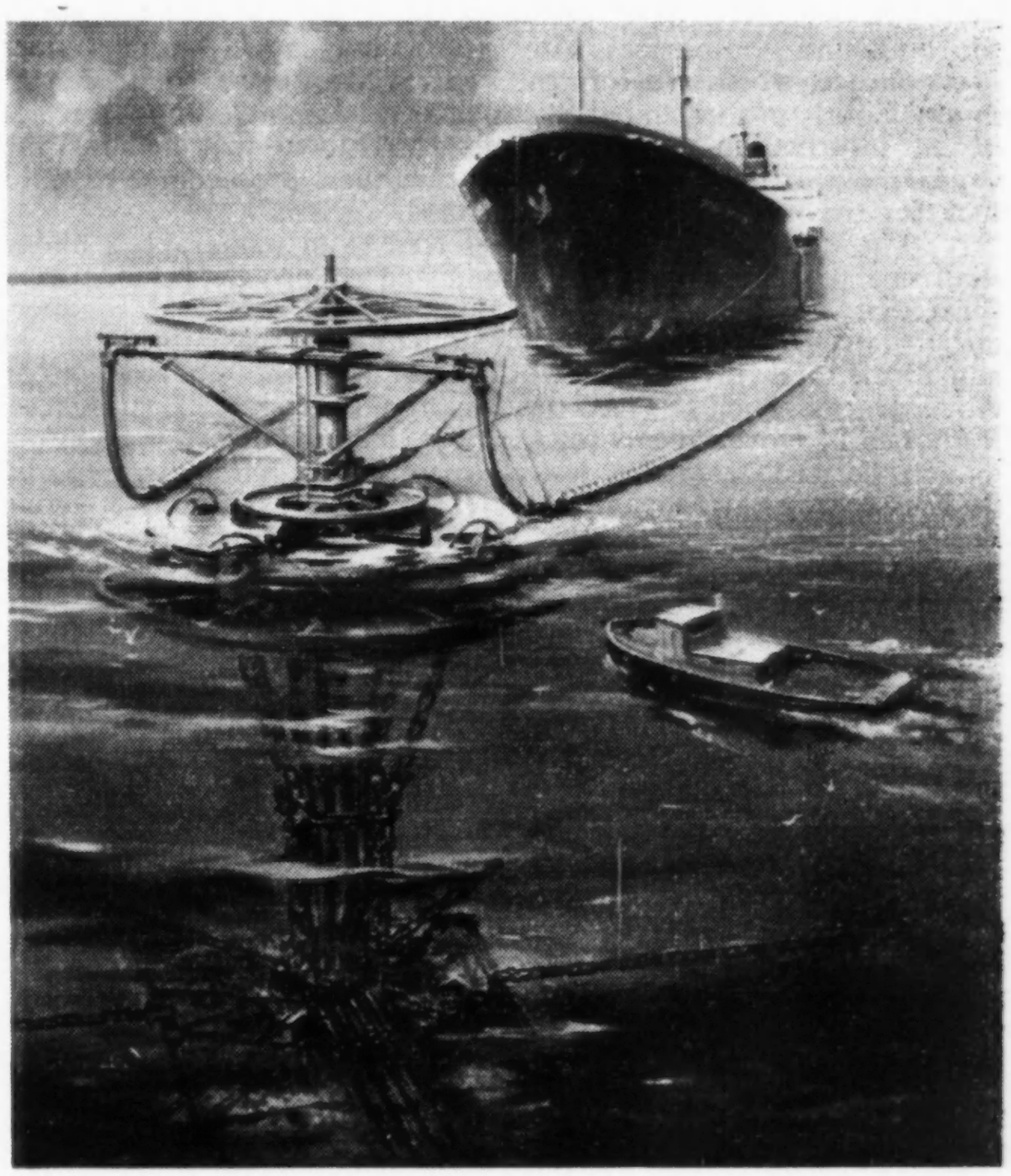
(1) The total revenue tons of cargo carried during 1963 on the trade routes specified in Appendix B;

(2) The total gross freight revenue earned on such cargo carried;

(3) The number of revenue tons of certain commodities to be agreed upon with an indication of the basis of revenue tons used; and

(4) The gross freight revenue earned from the carriage of such commodities as are agreed upon under sub-paragraph (3) above.

These statistics will be presented as aggregated total for each conference of shipowners concerned; the method of aggregation will be decided by each conference for itself. When all the information has been assembled and aggregated by each conference it will be made available to the Government of the country in which the conference has its headquarters. That Government will in turn



The prototype of a new single point mooring buoy, now being laid off Britain. The manufacturers, Harland and Wolff Ltd., London, believe that it may obviate conventional berths for loading or discharging oil tankers. Where there is insufficient depth of water to take the new giant 100,000 ton oil tankers this new buoy could be sited in deeper water. The artist's sketch shows the anchor chains of the buoy connected to an anchor box recessed in the seabed. These chains, which are of fixed length, are always in tension, thus restricting the movement of the buoy at all states of the tide.

forward it to the OECD, which will then circulate copies to all 15 Governments. The information will be treated as confidential.

(3) This exchange of information between Governments will also include in the case of the conferences specified in Appendix C, which are based on the United States and concerned with trade outward-bound from the United States (to be referred to as 'outbound conferences').

(1) Copies of any letters, memoranda, circulars or documents exchanged between the outbound conferences and any of their common carrier member lines and/or any of their agents during the calendar year 1963 relating to rates, from the United States ports served by the respective trade to the foreign ports served, on a list of commodities to be agreed, other than documents which merely list or state such rates without discussions; and

(2) Copies of any reports, studies, analyses or documents compiled by or for or received by the outbound conferences in the calendar year 1963 with respect to all rates in the subject trade charged by the outbound conferences.

The copies referred to in sub-paragraphs (1) and (2) of this paragraph are solely those directly available at the offices in the United States of the outbound conferences.

(4) The 14 Governments are willing to use their good offices to facilitate the provision of information in this instance to resolve an immediate and specified difficulty, and this willingness to do so in this particular instance is wholly without prejudice to their known jurisdictional and other objections to a number of features of United States shipping legislation and to the procedure and activities of the Federal Maritime Commission.

(5) In recognition of the readiness of the 14 Governments to use their good offices to secure the information specified in paragraphs 2 and 3 above, the United States Government undertakes, if such efforts are successful, not to proceed with the enforcement of any of the Section 21 Orders* obtaining, including those applicable to the outbound conferences. Any proceedings now pending under these Orders, whether before the Federal Maritime Commission or in any Courts in the United States shall be terminated upon receipt of the information and documents. It is noted that pending the working out of the present arrangements, these proceedings have, in fact, for the time being been suspended.

(6) The statistical information referred to in paragraph 2 above shall not be published or communicated to private persons in a form that would prejudice individual carriers or reveal commercial secrets. Before any Government publishes the information in any form, that Government will consult with the Government or Governments which received the information from the conferences.

(7) The 14 Governments for their part have no objection to information derived from the letters, memoranda, circulars, reports, studies, analyses or documents referred to in paragraph 3 above being used in the preparation of public reports by the United States Government, provided that these do not identify either the conference or the carrier concerned.

(8) The information and documents to be exchanged under this agreement shall not be used for the purpose of criminal prosecutions or assessing fines or penalties against shipowners or conferences.

(9) The United States Government agrees to consult with the 14 Governments before using information or documents in formal proceedings before the Federal Maritime Commission. Such consultations may include at the request of either side a discussion of alternative methods of solving the problem involved. The 14 Governments participating in such consultations are not thereby departing from their previously expressed views (reference is made to paragraph 4 of these minutes) that they object to governmental interference in international shipping and to governmental rate-fixing.

(10) The Governments undertake to make their best efforts to produce promptly the information and documents specified in paragraphs 2 and 3.

* **Note by the Secretariat:** *This refers to Section 21 of the United States Shipping Act of 1916.*

APPENDIX A. Conferences providing statistical information

North Atlantic/Continental Freight Conference; Continental North Atlantic Westbound Freight Conference; North Atlantic United Kingdom Freight Conference; North Atlantic Westbound Freight Association; North Atlantic Mediterranean Freight Conference; West Coast of Italy, Sicilian and Adriatic Ports/North Atlantic Range Conference (WINAC); North Atlantic French Atlantic Freight Conference; French North Atlantic Westbound Freight Conference; North Atlantic Baltic Freight Conference; Scandinavian Baltic/United States North Atlantic Westbound Freight Conference; Pacific Westbound Conference; Trans-Pacific Freight Conference of Japan; Far-East Conference; Japan-Atlantic and Gulf Freight Conference; Pacific Coast European Conference; Outward Continental North Pacific Conference.

APPENDIX B. List of Trade Routes

From United States North Atlantic ports to Belgium, Holland and Germany.

From Belgium, Germany and the Netherlands to United States North Atlantic ports.

From United States North Atlantic ports to the United Kingdom and Eire.

From the United Kingdom and Eire to United States Atlantic Coast ports.

From United States North Atlantic ports to ports on the Mediterranean Sea.

From ports in Italy, Sicily, Sardinia and on the Adriatic Sea to United States North Atlantic ports.

From United States North Atlantic ports to French Atlantic ports.

From French North Atlantic ports to United States North Atlantic ports.

From United States North Atlantic ports to Swedish ports.

From Sweden to United States North Atlantic ports.

From United States Pacific Coast ports to ports in Japan.

From Japan to United States Pacific Coast ports.

From United States Atlantic and Gulf ports to ports in Japan.

From Japan to United States Atlantic and Gulf ports.

From United States West Coast ports to ports in Scandinavia and Continental Europe.

From Scandinavia and Continental Europe to United States West Coast ports.

APPENDIX C. Outbound Conferences providing Documents

North Atlantic/Continental Freight Conference.
North Atlantic United Kingdom Freight Conference.
North Atlantic Mediterranean Freight Conference.
North Atlantic French Atlantic Freight Conference.
North Atlantic Baltic Freight Conference.
Pacific Westbound Conference.
Far East Conference.
Pacific Coast European Conference.

Road transport conference at PLA

A MEETING between officials of the Port of London Authority and representatives of exporting organizations, goods carriers and shipowners using the Port of London was held on January 15 to discuss the problems caused by the irregular flow of road traffic into the Port of London's enclosed docks.

Announcing this at a press conference held after the meeting, Mr. Dudley Perkins, general manager of the PLA, said that the meeting had discussed the possibilities of setting up a booking system and of establishing a central information room to act as a clearing house of communication and information. The relationships between merchants, sellers and manufacturers and the period of time for which Letters of Credit could be made available were also considered.

Removal from the Register of an Agreement under Section 12 of the Restrictive Trade Practices Act 1956

THE BOARD OF TRADE have given a direction to the Registrar of Restrictive Trading Agreements under Section 12 of the Restrictive Trade Practices Act 1956, authorizing him to remove from the Register particulars of an agreement between members of the Scottish Hosiery and Knitwear Manufacturers' Association and members of the Wholesale Textile Association.

Section 12 of the Act provides that the Board of Trade may, upon representations from the Registrar, give directions authorizing him to remove from the Register particulars of such agreements of which particulars are for the time being entered therein as appear to the Board to be of no substantial economic significance.

Section 12(3) of the Act requires the Board of Trade to lay before each House of Parliament a statement containing particulars of the agreements to which the directions relate and this was done on January 19.

Note: The agreement to be removed from the Register relates to a recommendation about settlement discounts. Seventy-two previous directions have been issued by the Board of Trade under Section 12.

Applications for temporary exemption from import duty

THE BOARD OF TRADE are considering applications for the temporary exemption from import duty of the materials listed below on the grounds that these materials are not made in this country or the Commonwealth or the supply available from these sources is not substantial having regard to the existing United Kingdom demand.

Representations are invited from manufacturers in this country or agents of Commonwealth manufacturers who consider they are, or will be within a reasonable period, in a position to supply a substantial proportion of the United Kingdom demand for these materials, or who are interested in their future production.

Temporary exemptions come into effect on the operative date of the Treasury Order in which the materials are specified and normally continue until the end of the current calendar year, when they are reviewed.

Interested parties who wish to make representations should address them to Tariff Division, Board of trade, 1 Victoria Street, London, S.W.1., preferably through a Trade Association, giving the respective reference shown below and stating whether their names may be passed to the applicants for temporary exemption. Representations should be received by February 5.

Tariff heading	Proposed definition for tariff purposes	Applied for as	Exemption required until	Reference
28.57	Silane	As in previous column .	December 31, 1965	6626
29.02	Chloromethane . .	As in previous column .	May 5, 1965	6169
29.08	Musk ambrette . .	As in previous column .	December 31, 1965	6647
29.13	Fenchone . . .	As in previous column .	December 31, 1965	6645
29.15	Benzenedicarboxylic acid, mixed isomers.	Amoco isophthalic acid-75 (IPA-75) a mixture of approximately 70% isophthalic and 30% terephthalic acids.	December 31, 1965	6646
29.31	Dimethyl sulphoxide .	As in previous column .	December 31, 1965	4969
29.35	2 - Chloromethylpyridine hydrochloride	2-Picolyl chloride hydrochloride	December 31, 1965	6652

Note: Withdrawal of application:

Interested parties will wish to know that the application for temporary exemption from import duty in respect of the chemical covered by the following description and advertised in the *Board of Trade Journal* on the date shown has been withdrawn.

Tariff heading	Proposed definition for tariff purposes	Applied for as	Exemption required until	Date published	Reference
29.01	Cyclopropane	As in previous column	December 31, 1965	September 4, 1964 (page 500)	6567

Marking of imported electric incandescent lamps

THE BOARD OF TRADE announce that in pursuance of the powers conferred on them by section 3 of the Merchandise Marks Act 1926 they have given a Direction, namely, the Merchandise Marks (Imported Goods) No. 2 Order 1928 (Provisional Exemption) Direction 1965 in regard to the Merchandise Marks (Imported Goods) No. 2 Order 1928, as amended.

The Direction exempts imported electric incandescent lamps of the following description from having to bear an indication of origin as prescribed by the Order and permits the indication to be (i) indelibly stamped, embossed, incised or impressed on the cap of the lamp and (ii) indelibly marked on the carton, wrapper or other container in which the lamp is imported, sold or exposed for sale, as the case may be:

> Electric incandescent lamps, the bulb of which is 55 millimetres or less in diameter and internally coated on its top half with an obscuring finish.

Copies of the Direction (S.I. 1965 No. 17) can be obtained from HM Stationery Office, Kingsway, London, W.C.2, and branches, or through any bookseller, price 3d. (by post 5½d.).

The Direction affords temporary relief only. The question whether the Order should be amended in accordance with the terms of the Direction or otherwise is being referred to the Standing Committee appointed by the Board of Trade under section 4 of the Merchandise Marks Act 1926.

Any persons desiring to make representations to the Committee on this matter should communicate not later than February 26, 1965, with the Secretary, Merchandise Marks Committee, Board of Trade, Room 603, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877, Ext. 2555).

Cancellation of 'Licences of Right'

PROCEEDINGS UNDER SECTION 36 of the Patents Act, 1949. Notice is hereby given that application has been made for the cancellation of the endorsement 'Licences of Right' on the following Patent.

No.	GRANTEES	SUBJECT-MATTER
736,932	International Harvester Co. . .	Tractor power take-off shaft assemblies.

Any person may give notice of opposition to the application by filing Patents Form No. 46 at the Patent Office, 25 Southampton Buildings, London, W.C.2, on or before February 20, 1965.

GORDON GRANT,
Comptroller-General.

The Patent Office.

Following the Aluminium Co. of America's order for over $100,000 of Brook Nema motors, shipment has taken place recently of over 91 tons of the consignment. The shipment is of 183 motors, many over 100 h.p. for exacting duties ranging from pumping and machine tools to conveying. The motors are all for use in the new American Aluminium plant at Suriname. In the picture above one of the first shipments is seen leaving the factory.

The Leyland Group OE.160 diesel engine is used to power the Standard MS.12 agricultural tractor manufactured by Bührer Traktorenfabrik A. G. of Zurich, Switzerland, whose recent £92,000 contract for the unit makes them the sixth European tractor manufacturer to use Leyland diesels.

New Books

British Industry (2s. 6d. a copy, subscription 60s. a year, from 21 Tothill Street, London, S.W.1) is the title of a new fortnightly published jointly by the Federation of British Industries and the British Employers' Confederation of which the first issue, dated January 8, 1965, is now available. The new magazine replaces both the glossy monthly *FBI Review* and the slighter BEC *Bulletin*, and it incorporates some features from both its predecessors – including the 'Industrial Notebook' and 'Business Barometer' departments of the *FBI Review*, and the news and comment on labour, social and industrial welfare questions which were characteristic of the BEC *Bulletin*. But its physical appearance is now more like that of the political and literary weeklies that appear on the bookstalls at weekends, and the first issue additionally carries contributed articles on general economic, overseas and industrial affairs, as well as a page of book reviews. In a welcoming message printed in this first issue, Mr. Douglas Jay, President of the Board of Trade, says: 'I am sure that it will fulfil a most useful role and I send my best wishes for its success'.

Employment and Unemployment in the Hull Region 1951-1968, by Eric W. Evans and Keith Hartley (95 pages. Department of Economics, The University of Hull, 10s.). The survey provides a factual account of the labour force in Hull during the period covered and predicts the region's manpower situation in 1968. The authors use official statistics as the basis for comparisons between Hull and the rest of the country, and then comment upon the comparisons and the facts revealed by them. In order to predict future labour requirements a questionnaire was sent to a large number of firms asking about their demands for labour in 1958, 1963 and the future demand in 1968. From the broad survey, the authors conclude that the demand for labour in the Hull region will continue to rise, though it will require increasingly fewer unskilled, and more qualified, workers.

The Law of Hire Purchase, by David Wild (xli, 341 pages. Butterworths, 47s. 6d.). The first edition of this practical textbook on hire purchase law was published in 1960, and it has now been revised to take account of changes in the law resulting from the coming into force of the Hire Purchase Act 1964, and of important cases in hire purchase law which have been decided since 1960. There have been important decisions relating to damages in recent years, and this subject is dealt with in the only entirely new chapter in the new edition. The remaining chapters have been in some cases regrouped, and in others expanded by the addition of essential new material. This book should serve as a useful reference book for traders, as well as legal advisers, in need of guidance through the complexities of hire purchase law. The text of the relevant legislation is reproduced in appendices to the book, which is fully indexed.

A Review of Colonial Research, 1940-1960, by Sir Charles Jeffries (238 pages. 21s., by post 22s. 2d., from HM Stationery Office and Government bookshops). A former Deputy-Under-Secretary of State at the Colonial Office here gives a comprehensive account of the organization and achievements of research carried out over 20 years for the Colonial Research Council and the various specialist research councils and committees, under the Government's financial provisions in the 1940 Colonial Development and Welfare Act. The research effort has been spread over a wide number of subject fields – mostly within those biological and agricultural sciences which are of particular interest in tropical countries, but also including some work in the social sciences – and the author tells the story of some of the individual projects, as well as of the broad sweep of work undertaken in different countries and at different times. The book, which is indexed, is liberally illlustrated with photographs and maps, and includes in appendices a complete list of research reports published by Her Majesty's Stationery Office and complete lists of members of the various research committees and councils.

Recent Developments in Iron- and Steelmaking, With Special Reference to Indian Conditions, 'Papers . . . from an International Symposium' (239 pages. 105s., from the Iron and Steel Institute, 4 Grosvenor Gardens, London, S.W.1). In India the iron and steel industry in its present form dates only from as recently as 1875. The past achievements of the Indian industry and the problems facing it in the future were discussed at an international symposium held in Jamshedpur in February 1963, which was organized jointly by the Indian Institute of Metals, the National Metallurgical Laboratory, Jamshedpur, and the Iron and Steel Institute, London. This present volume contains the text of the papers given at that meeting, together with a large number of illustrations, tables and diagrams. It includes a synopsis of each paper, and of the discussions at each meeting. The symposium was divided into three technical sessions, dealing with 'Preparations and use of Indian raw materials for ironmaking', 'Choice of steelmaking processes,' and 'Planning and design of new plants'. Papers were given by both Indian and British engineers, and while emphasis is placed on Indian conditions, yet much of the technical data given is of course valid for iron and steel manufacture elsewhere in the world.

DEA Progress Report is a new monthly periodical prepared in the Department of Economic Affairs as a replacement for the Treasury's former *Bulletin for Industry*. The first issue is dated January 1965 and is in two parts, 'Economic' and 'Industrial and Regional'. It has an introduction by the First Secretary of State, Mr. George Brown, and reports on prices and incomes policy, regional problems, and the work of DEA. Copies are obtainable free from Circulation Section (H), Publications Division, Central Office of Information, Hercules Road, Westminster Bridge Road, London, S.E.1.

Advertising and the Labour Government, by George Darling (11 pages. Free from the Institute of Practitioners in Advertising, 44 Belgrave Square, London, S.W.1). The full text of a speech made by the Minister of State, Board of Trade, at the annual Council Dinner of the Institute, at the Livery Hall, Guildhall, on 1st December 1964. Excerpts from the speech were earlier published in the *Board of Trade Journal* of 11th December 1964 (page 1258).

Manual of Imports and Exports Control, Pakistan. Office of the Chief-Controller of Imports and Exports, Government of Pakistan (442 pages. Rs.5 from Pakistan Government Printing Office, Karachi). A collection of the Rules, Regulations and Orders governing the control of imports and exports of Pakistan, in eight chapters dealing with specific aspects of trade, Import and Export Control (Licenses, Free Lists, Permits), and Export Bonus Scheme, and so on. Appendices give the relevant legislation in full, together with Ministry of Commerce Public Notices. Specimens of all forms used in the import-export business are also reproduced, and questions such as bank guarantee and undertaking and procedure for imports under foreign loans/aid are also dealt with.

Other publications

TOBACCO TRADE YEAR BOOK AND DIARY 1965. 116 pages. Trade Publications Ltd., 17-19 John Adam Street, Adelphi, London, W.C.2. 5s.

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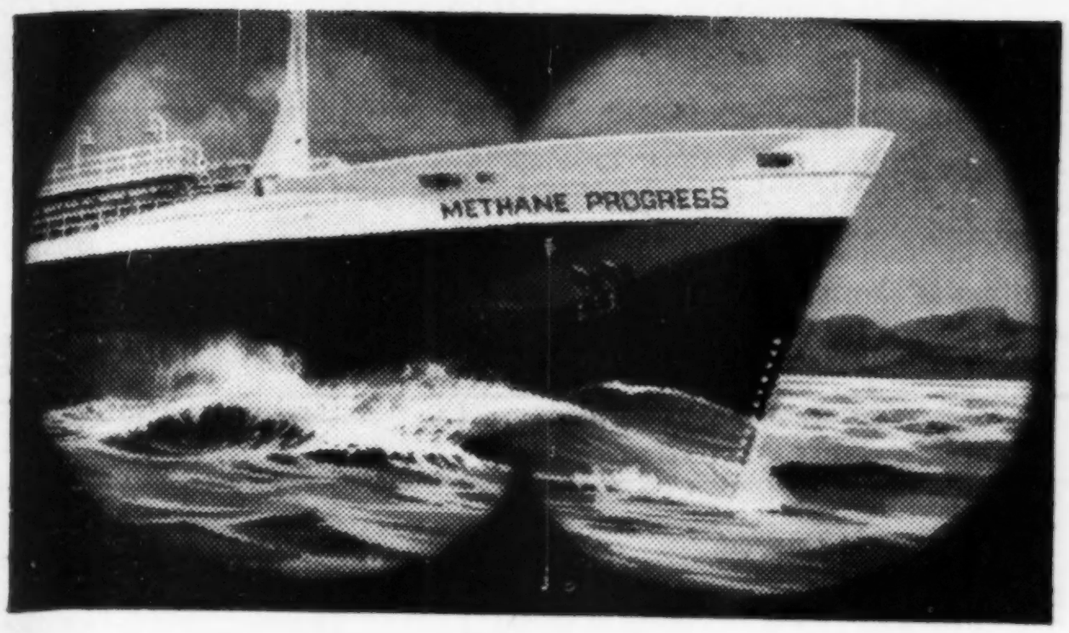

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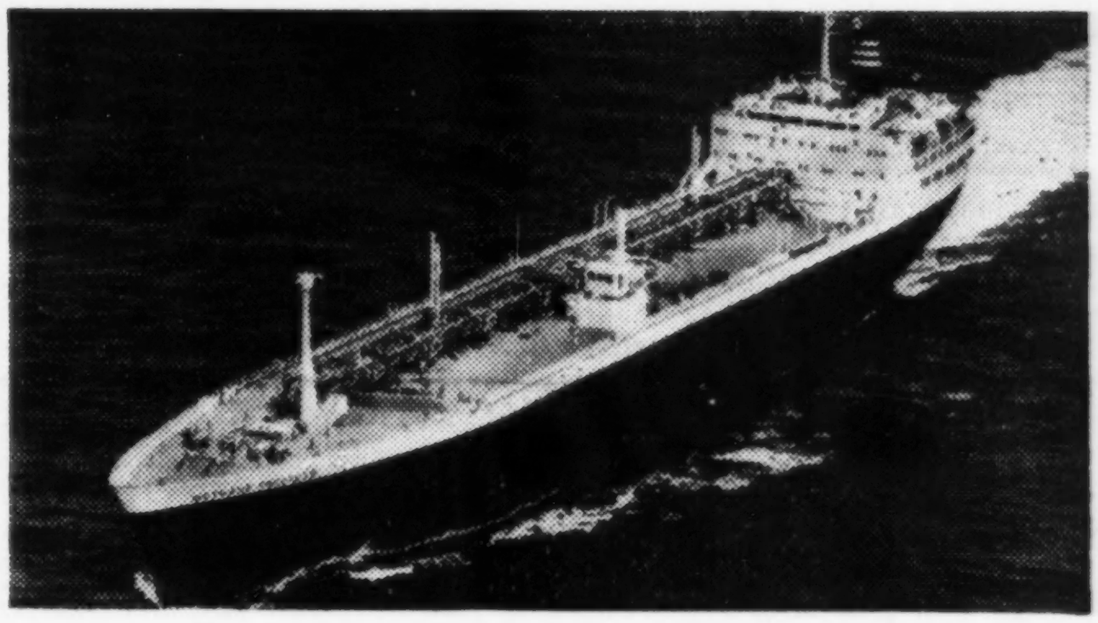

New Ship . . .

New Cargo

BIG NEW DISCOVERIES of natural gas have brought to the forefront a primary fuel that can transform a country's fuel and power position. Until now, Britain has not benefited from these finds, for our known reserves of natural gas are very small. The 'Methane Progress' and her sister ship, 'Methane Princess,' are changing this: for their cargo is gas.

These ships are the first ever to do a regular ocean-going run carrying such cargo. They load refrigerated Saharan methane (liquefied so that it occupies only 1/600th of its volume) at the Algerian port of Arzew, and unload at Canvey Island where the liquid methane is turned into gas again and pumped at high pressure into a national underground pipeline.

Never before has methane been transported by sea on a commercial scale. It will now be coming to Britain in quantities large enough to account for one-tenth of our total present gas requirements. The successful marine transportation of methane is not only an exciting new chapter in the history of fuel technology, but may well be the start of a new world industry.

In today's high speed world . . .
the gas industry thinks of tomorrow.

Statistics

The economy: selected indicators

Series expressed as index numbers and seasonally adjusted except where otherwise shown

	GROSS DOMESTIC PRODUCT (expenditure estimates)	INDEX OF INDUSTRIAL PRODUCTION	CONSUMERS' INCOME AND EXPENDITURE				FIXED CAPITAL EXPENDITURE					CHANGES IN STOCKS			
			Personal disposable income	Total consumers' expenditure		Retail sales	Total	Selected components				Total	Selected components		
								Manufacturing industry	Distributive and service industries	Dwellings	Public sector excluding dwellings		Manufacturing industry	Wholesalers	Retailers
	at 1958 prices		at current prices		at 1958 prices	at 1961 prices	at 1958 prices					at 1958 prices			
Base of index	1958	1958	1958	1958	1958	1961	1958	1958	1958	1958	1958				
Value in base year, £m.	19,984	—	15,988	15,258	15,258	9,095	3,478	922	688	591	1,205	series shown in £ million			
1959	104	105	106	105	105	95	108	94	115	113	109	+174	+ 73	+15	+49
1960	109	112	114	110	109	98	119	110	127	129	114	+592	+520	+48	+37
1961	113	114	122	116	111	100	129	130	135	137	121	+319	+230	+36	+29
1962	113	115	127	122	113	101	128	119	130	141	124	+101	+ 33	+22	+39
1963	117	119	135	129	118	103	130	107	140	146	132	+133	+ 89	+29	+30
1963															
1st quarter	113	113	130	125	114	101	115	104	134	101	116	— 20	+ 49	— 4	N/C
2nd quarter	116	118	132	128	117	102	129	109	134	150	128	+ 38	— 9	+17	— 5
3rd quarter	116	120	138	130	120	105	135	106	141	164	140	— 36	— 12	— 7	— 6
4th quarter	123	124	138	132	121	105	140	109	149	168	143	+151	+ 61	+23	+41
1964															
1st quarter	121	127	141	134	121	106	144	115	153	175	150	+ 96	+ 79	+ 2	+ 4
2nd quarter	121	127	143	135	120	105	148	120	153	181	149	+146	+126	+ 5	+ 1
3rd quarter		127		138	122	106	150*	121	167	186*	152*		+ 77	+ 6	+13
1964															
May	..	127	..	..	..	104	..	..	..	..	..	..	..	..	..
June	..	127	..	..	..	105	..	..	..	..	..	..	..	..	..
July	..	127	..	..	..	105	..	..	..	..	..	..	..	..	..
August	..	127	..	..	..	106	..	..	..	..	..	..	..	..	..
September	..	127	..	..	..	107	..	..	..	..	..	..	..	..	..
October	..	129*	..	..	..	109	..	..	..	..	..	..	..	..	..
November	..		..	..	..	108	..	..	..	..	..	..	..	..	..

	ORDERS		PRICES AND COSTS					LABOUR						IM-PORTS	EX-PORTS	BALANCE OF PAYMENTS: current balance
	Engineering industries: orders on hand†	Textiles and clothing industries: orders on hand†	Index of retail prices		Wholesale price index: non-food manufacturing industry		Hourly wage rates: all industries and workers†	Wholly unemployed excluding school leavers			Unfilled vacancies for adults					
			Index†	% change on year earlier	Basic materials and fuel used†	Manufactured products: home sales†		Mid-month or monthly average†	Change from previous period†	Normal seasonal change	Mid-month or monthly average†	Change from previous period†	Normal seasonal change	at current prices		
	at 1958 prices															
Base of index	Dec. 1958	Apr. 1959	Jan. 17, 1956 (Derived series from January 1963)		1954	1954	Jan. 31, 1956							1958	1958	series shown in £ million
Value in base year, £m.	..	..	—		—	—	—	series shown in thousands						3,748	3,176	
1959	101	135	109·6	+0·6	103·4	114·2	117·4	433	+ 31	..	157	+21	..	106	105	+153
1960	117	136	110·7	+1·0	104·5	116·0	122·5	337	— 96	..	212	+55	..	121	112	—258
1961	120	104	114·5	+3·4	104·4	119·1	130·3	305	— 32	..	213	+ 1	..	117	116	— 1
1962	115	100	119·3	+4·2	103·0	120·6	136·2	419	+114	..	149	—64	..	120	119	+115
1963	135	117	121·7	+2·0	104·5	122·0	141·3	502	+ 83	..	144	— 5	..	129	128	+113
1964							148·4*	362	—140	..	221	+77	..	147*	134*	
1963																
1st quarter	117	100	121·4	+3·1	103·6	121·4	139·3	627	+136	+42	113	— 7	— 5	120	124	+ 82
2nd quarter	123	105	122·1	+1·6	104·2	121·8	140·6	504	—123	—58	147	+34	+33	127	127	+ 34
3rd quarter	130	100	121·3	+1·3	104·2	122·1	141·4	428	— 76	—34	157	+10	+ 6	132	131	+ 2
4th quarter	135	117	122·1	+2·1	106·1	122·6	142·8	450	+ 22	+50	157	Nil	—34	136	132	— 5
1964																
1st quarter	140	121	123·2	+1·5	107·9	124·0	145·7	445	— 5	+42	182	+25	— 5	145	134	— 70
2nd quarter	148	125	125·5	+2·8	107·8	125·0	147·3	355	— 90	—58	230	+48	+33	147	133	—109
3rd quarter	155*	113*	126·5	+4·3	108·6	125·8	149·1	311	— 44	—34	242	+12	+ 6	147	132	—127
4th quarter					109·9*	126·8*	150·4*	336	+ 25	+50	228	—14	—34	148*	137*	
1964																
May	147	126	125·7	+2·9	107·6	125·1	147·5	357	— 37	—23	227	+15	+ 9	144	140	..
June	148	125	126·2	+3·4	107·8	125·2	148·4	315	— 42	—33	251	+24	+13	152	132	..
July	151*	120*	126·2	+4·0	108·1	125·5	149·0	303	— 12	—15	250	— 1	+ 3	138	125	..
August	153*	117*	126·7	+4·7	108·6	125·7	149·3	314	+ 11	+10	239	—11	— 9	153	140	..
September	155*	113*	126·7	+4·4	109·1	126·2	149·7	315	+ 1	+11	239	Nil	— 7	151	131	..
October	157*	119*	126·8	+4·1	110·0*	126·3*	149·8	332	+ 17	+27	233	— 6	—12	146	133	..
November		127*	127·8	+4·6	110·3*	127·0*	150·6	338	+ 6	+19	230	— 3	—16	152	135	..
December					109·4*	127·2*	151·9*	337	— 1	— 1	222	— 8	—11	146*	144*	..

† NOT seasonally adjusted. * Provisional.

Provisional figures of UK trade in December

Seasonally adjusted values

United Kingdom exports in December were £381 million, imports were £455 million and re-exports £13 million.

Exports

After eliminating normal seasonal variations United Kingdom exports in the fourth quarter were 4 per cent more than in the third quarter. In 1964 as a whole they were 4 per cent more than in the year 1963.

Imports

On the same basis, imports in the fourth quarter were the same as in the third quarter. In 1964 as a whole they were 14 per cent more than in the year 1963.

Re-exports

Seasonally adjusted re-exports in the fourth quarter were £13 million a month compared with £14 million in the third quarter. In 1964 as a whole they were £13 million a month. The monthly average for 1963 was £13 million.

Trade balance

In the fourth quarter it is estimated that the deficit of visible trade in the balance of payments was £41 million a month, seasonally adjusted. In the third quarter it averaged £52 million a month. In 1964 as a whole it averaged £44 million a month; in 1963 it was £4 million a month.

United Kingdom Trade

Seasonally adjusted values £ million per month

	Exports f.o.b.	Imports c.i.f.	Re-exports f.o.b.	Trade balance
1962	316	374	13	— 6
1963	340	402	13	— 4
1964	354	460	13	—44**
1963 1st quarter	328	375	12	+ 7
2nd quarter	336	396	13	— 2
3rd quarter	346	412	13	— 8
4th quarter	350	423	13	—14
1964 1st quarter	356	453	12	—36
2nd quarter	352	461	13	—45
3rd quarter	349	461	14	—52
4th quarter*	363	461	13	—41**
July	331	430	13	—41
August	370	479	14	—51
September	346	472	14	—64
October	351	455	12	—54**
November	357	474	14	—54**
December*	381	455	13	—16**

* Provisional. ** Estimated.

Recorded values

United Kingdom exports in December were valued at £379·9 million, imports at £460·3 million and re-exports at £13·3 million.

£ million per month

	Exports f.o.b.	Imports c.i.f.	Re-exports f.o.b.
1963 1st quarter	332·6	381·3	13·3
2nd quarter	343·6	397·5	13·3
3rd quarter	324·9	400·7	11·6
4th quarter	359·0	427·2	13·2
1964 1st quarter	360·1	460·4	12·8
2nd quarter	363·6	465·8	13·1
3rd quarter	325·1	445·5	11·9
4th quarter*	369·0	468·7	13·3
October	362·4	491·6	12·5
November	365·7	456 4	13·9
December*	379·9	460·3	13·3

* Provisional.

(*Continued in next column*)

Trade balance

The monthly figures for the trade balance – strictly the 'balance of visible trade on a balance of payments basis' – are estimated and are only published seasonally adjusted. They are consistent with the quarterly balance of payments statistics and are intended, taking runs of several months together, to give the best guidance to the trend, which can be deduced from the monthly trade figures. They exclude insurance and freight, included in the valuation of imports in the Trade Accounts, which in so far as they are paid abroad are included in the invisibles account; there are also other differences between the Trade Account figures and those used in the balance of payments statistics.

It is misleading to calculate, using the Trade Accounts figures as they stand, the difference between imports and exports plus re-exports and describe this as the trade gap.

Forthcoming changes in the release of the UK trade figures

MORE INFORMATION is to be given in future when the provisional trade figures are issued, starting next month with those for January 1965. This will be made possible by the figures being then compiled on HM Customs' Leo III computer.

The new system will enable the provisional results to include, in addition to total figures, information on main areas and main commodity groups. This will permit a fuller and more useful appraisal of trends than has been possible hitherto at the provisional stage. Despite the extra detail, it is expected that the provisional figures will be no later than under the old arrangements and could be earlier; until the new arrangements have been tried out it is not possible to be more precise about the timing. Also beginning with January, 1965, the coverage of the trade figures is being changed to include precious stones, and the method of valuing sugar and parcel post imports is being revised; the absolute levels of total trade will be higher but the trends will be little affected.

Form of announcement

Under the new arrangements the provisional figures will be extended to take account of the main area and commodity detail and some commentary on changes in trade by area and commodity will be included with the figures published in the *Board of Trade Journal*. The release of this comment with the provisional tables reduces the need for a commentary on the detailed figures as often as every month and it is proposed in future to issue a detailed analysis, only once a quarter.

Coverage and valuation adjustments

The changes in coverage and valuation of the trade statistics will be made from January 1965. The substantial trade in precious stones (mainly diamonds) – about £150 million per annum both for imports and exports – will be included in the Trade Account figures. For sugar, the high proportion of imports purchased under the Commonwealth Sugar Agreement will be valued at the Agreement negotiated price (which is the relevant price from the viewpoint of the balance of payments) instead of at the world price. Finally, revised higher values of imports by parcel post will be introduced in 1965. It is estimated that the total effect of these changes will be to add on average about £18 million a month to the Trade Accounts figure of imports and about £13 million a month to exports. Since the estimates of the trade balance already allow for trade in precious stones and the sugar price difference, they will only be affected by the parcel post valuation revision, which will have an adverse effect of about £3 million a month.

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Telephone inquiries should be made to Waterloo 4944, Ext. 1195.

Industry's capital expenditure in the third quarter of 1964

REVISED ESTIMATES for the third quarter of 1964 show that the volume of industry's capital expenditure (at 1958 prices, seasonally adjusted) was nearly 5 per cent higher than in the second quarter of the year. Expenditure on new building work and on plant and machinery both increased by about 3 per cent, and there was a more marked increase of 10 per cent in expenditure on vehicles, due largely to increased expenditure on ships.

Within the total for private industry as a whole, expenditure by manufacturing industry was about the same as for the second quarter of 1964, and there was an increase of approximately 9 per cent for the distributive and service industries. At the provisional stage (published in *Board of Trade Journal* of December 11, 1964), the results were much the same for manufacturing industry but the increase then calculated for the distributive and service industries was somewhat smaller at 4 per cent.

The series for the distributive and service industries have been revised using the results of the Inquiry into the Distributive and Service Trades for 1963 (see *Board of Trade Journal* of January 1, 1965) and, at the same time, the seasonal adjustment calculations have been brought up-to-date.

Manufacturing industry

The revised estimates for the third quarter of 1964 show that capital expenditure by manufacturing industry (at 1958 prices, seasonally adjusted) remained virtually unchanged after rising by about 5 per cent between the first and second quarters. Expenditure on plant and machinery rose by just over 2 per cent but this increase was offset by the decrease in expenditure on new building work and vehicles.

Detailed figures relating to the third quarter expenditure of individual industry groups appear in Table 2; these detailed series tend to move irregularly and small changes may not be significant. Investment by the chemical group of industries continued the strong upward movement which began in the first quarter of 1964 and expenditure in the third quarter was about 25 per cent above the level at the end of 1963. The engineering group of industries showed a small fall between the second and third quarters but nevertheless their capital expenditure still remained substantially above its 1963 level. The metal manufacturing group of industries (mainly iron and steel) again remained around the level reached in the third quarter of 1963 following the fall from the very high figures of 1961. The textiles, leather and clothing industries maintained their expenditure at the higher level reached this year, a level which is somewhat above the previous peak of expenditure in the third quarter of 1961.

Distributive and service industries

Revised estimates for the third quarter of 1964 show that the volume of expenditure (at 1958 prices, seasonally adjusted) rose by about 9 per cent. As is seen in Table 3 the largest proportionate increase during the quarter was in shipping and there was some appreciable increase in the 'other industries' group (which includes banking, insurance, property owning concerns, construction, transport, catering, entertainment and other service industries). There was no sizeable change in the wholesale and retail trades. Expenditure on all three assets rose, that on vehicles – which include ships – showing the greatest increase.

Revision of previous figures

The figures for the distributive and service industries have been revised in two respects since they were last published.

First, the figures for 1963 have been revised following the publication of the results of the Inquiry into the Distributive and Service Trades for 1963. The revision for the year has the effect of increasing the total expenditure by £64 million at current prices. It does not, however, include any revision for the construction industry, and some further changes may be required when the results of the Census of Production for 1963 become available later in the year.

The revisions have been carried through to the quarters of 1963 in Table 4, and in the figures at 1958 prices, seasonally adjusted in Table 3, and in consequence the figures for 1964 in both tables have also been revised.

Following the above revisions to the quarterly figures for 1963 and 1964, the entire series has been subjected to a further round of seasonal adjustment calculations. The calculations involved have previously been described in articles appearing in the *Board of Trade Journal* on July 6 and December 14, 1962, when it was explained that the method used is a variant of UNIVAC method II developed by J. Shiskin of the United States Bureau of the Census. The effect of these revisions has been almost negligible in all quarters of 1959 to 1964.

Revision of manufacturing industry figures

Seasonal adjustment revisions of the manufacturing industry series will be made at the same time as the estimates in this quarterly series are revised to take account of the results of the Census of Production for 1963, which will become available later in the year. From preliminary calculations which have been made it seems unlikely that these seasonal adjustment revisions will have any significant effect.

Industry's fixed capital expenditure

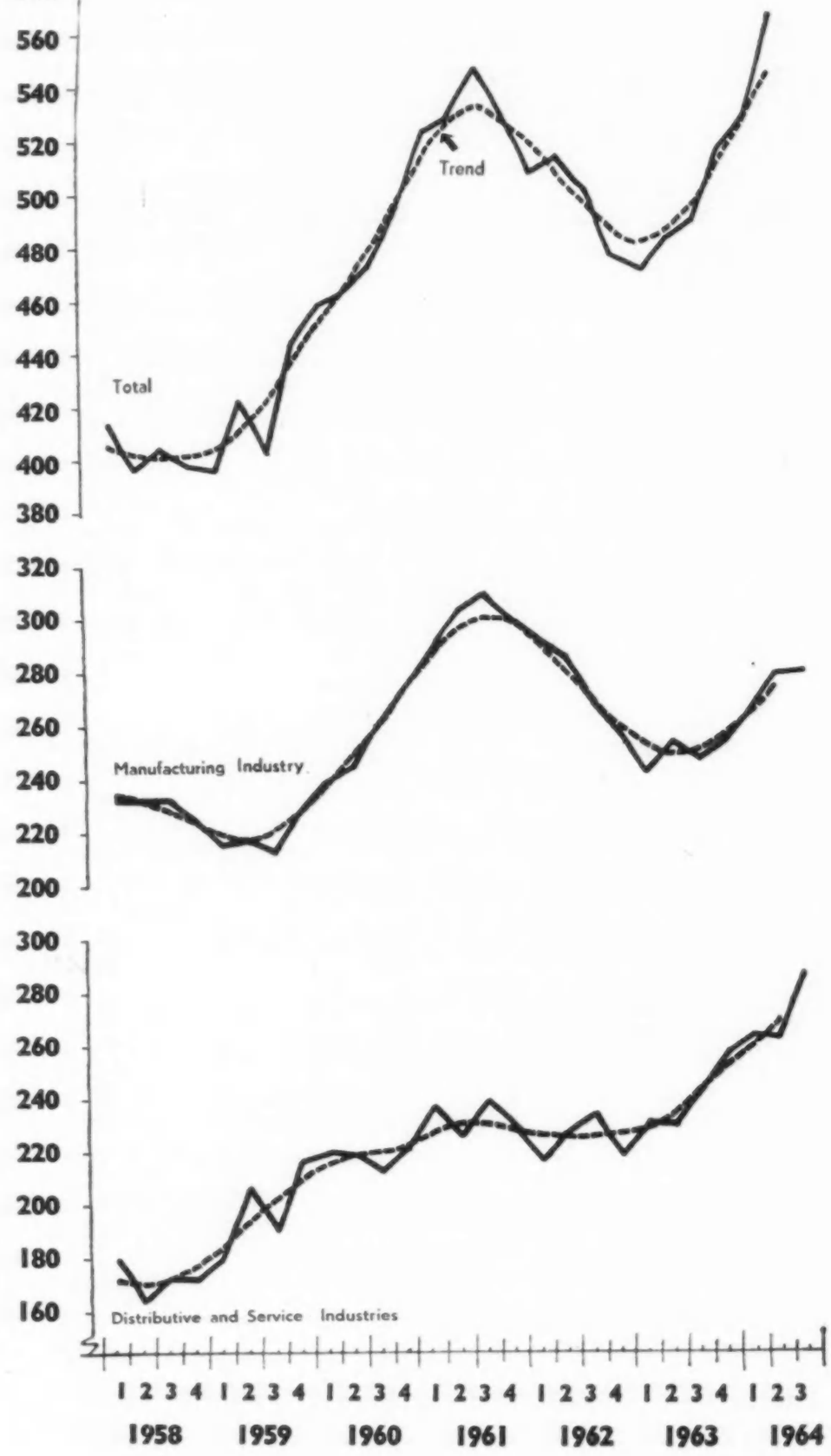


Table 1. Industry's fixed capital expenditure at 1958 prices seasonally adjusted (a)

£ million

Period	ANALYSIS BY INDUSTRIAL SECTORS		Total	ANALYSIS BY TYPE OF ASSET		
	Manufacturing Industry (b)	Distributive and Service Industries (c)		New Building Work	Vehicles	Plant and Machinery
1958	922	688	1,610	451	360	799
1959	871	792	1,663	460	403	800
1960	1,016	873	1,889	533	457	899
1961	1,195	931	2,126	631	437	1,058
1962	1,098	897	1,995	627	383	985
1963	987	961	1,948	593	426	929
1964						
1959 1st quarter	215	180	395	111	91	193
2nd quarter	216	206	422	111	110	201
3rd quarter	212	190	402	111	92	199
4th quarter	228	216	444	127	110	207
1960 1st quarter	238	220	458	133	112	213
2nd quarter	244	219	463	129	117	217
3rd quarter	261	212	473	133	111	229
4th quarter	273	222	495	138	117	240
1961 1st quarter	286	237	523	149	118	256
2nd quarter	302	226	528	159	104	265
3rd quarter	308	239	547	159	115	273
4th quarter	299	229	528	164	100	254
1962 1st quarter	291	216	507	159	94	264
2nd quarter	284	228	512	160	100	252
3rd quarter	267	234	501	165	94	242
4th quarter	256	219	475	143	95	237
1963 1st quarter	239	231	470	143	101	226
2nd quarter	252	230	482	149	101	232
3rd quarter	245	243	488	148	108	232
4th quarter	251	257	508	153	116	239
1964 1st quarter	264	264	528	155	121	252
2nd quarter	277	263	540	161	119	260
3rd quarter	278	287	565	166	131	268
4th quarter						

The total of manufacturing industry and of the distributive and service industries covers a wide sector of the economy, accounting – after exclusion of dwellings – for 56 per cent of total capital expenditure in 1960. The total comprises most industries and services outside agriculture, forestry and fishing, coal mining, public utilities, the public transport corporations and public administration. The excluded parts are, except for agriculture, very largely in the public sector of the economy and though some public expenditure is included, it is small; the figures are therefore very largely representative of the trend of expenditure of private industry and business.

For other footnotes, see end of article.

Table 2. Fixed capital expenditure of manufacturing industry at 1958 prices seasonally adjusted (a) (b) (d)

£ million

Period	ANALYSIS BY INDUSTRY GROUP										ANALYSIS BY TYPE OF ASSET		
	Food, Drink and Tobacco	Mineral Oil Refining	Chemicals, Paint and Printing ink	Metal Manufacture	Engineering, Shipbuilding and Metal Goods	Vehicles	Textiles, Leather and Clothing	Paper, Printing and Publishing	Other Manufacturing Industries	Total All Manufacturing Industries			
	Standard Industrial Classification Orders												
	III	Part of IV	Part of IV	V	VI, VII and IX	VIII	X to XII	XV	XIII, XIV and XVI	III to XVI	New Building Work	Vehicles	Plant and Machinery
1958.	112·6	39·7	157·3	143·5	204·8	69·8	63·6	65·2	65·1	921·6	247·0	52·4	622·2
1959.	106·5	23·5	145·5	129·7	200·8	69·0	66·5	60·3	69·1	870·9	223·8	57·1	590·0
1960.	128·5	15·3	134·5	186·1	228·9	78·3	85·2	67·8	91·6	1,016·2	263·5	75·3	677·4
1961.	136·9	22·8	162·8	242·4	250·5	104·2	101·5	74·4	99·7	1,195·2	318·1	71·8	805·3
1962.	134·8	16·3	161·6	208·2	220·0	93·8	87·1	74·9	101·3	1,098·0	297·9	61·8	738·3
1963.	137·3	18·5	141·8	117·0	219·2	91·3	84·6	73·5	103·8	987·0	264·2	77·7	645·1
1964.													
1959 1st quarter	25·2	4·0	43·2	30·1	49·3	18·5	13·6	15·3	15·8	215·0	55·4	13·8	145·8
2nd quarter	28·0	5·7	38·1	31·3	49·3	16·1	15·2	15·2	16·6	215·5	53·3	14·2	148·0
3rd quarter	27·3	6·2	30·6	34·2	49·2	15·1	17·2	14·7	18·0	212·5	53·1	13·7	145·7
4th quarter	26·0	7·6	33·6	34·1	53·0	19·3	20·5	15·1	18·7	227·9	62·0	15·4	150·5
1960 1st quarter	30·2	4·2	33·4	39·2	55·8	15·5	20·8	17·4	22·3	238·8	63·1	17·2	158·5
2nd quarter	31·5	4·3	31·3	42·3	55·9	19·5	21·7	15·4	21·9	243·8	62·4	18·5	162·9
3rd quarter	33·4	3·4	34·5	51·3	57·9	21·5	20·1	16·7	22·0	260·8	69·3	18·8	172·7
4th quarter	33·4	3·4	35·3	53·3	59·3	21·8	22·6	18·3	25·4	272·8	68·7	20·8	183·3
1961 1st quarter	33·9	3·3	39·8	59·4	60·8	24·6	23·8	16·8	23·7	286·1	74·3	19·0	192·8
2nd quarter	34·8	6·1	39·8	62·1	64·0	25·7	25·2	17·7	26·8	302·2	80·8	19·0	202·4
3rd quarter	34·0	6·3	42·4	51·4	63·3	27·3	27·9	20·6	24·9	308·1	80·4	17·8	209·9
4th quarter	34·2	7·1	40·8	59·5	62·4	26·6	24·6	19·3	24·3	298·8	82·6	16·0	200·2
1962 1st quarter	33·7	3·9	43·4	56·8	59·3	25·1	25·1	18·9	24·7	290·9	80·8	16·5	193·6
2nd quarter	33·1	3·9	42·4	58·2	56·3	22·9	22·2	19·2	25·4	283·6	78·7	14·7	190·2
3rd quarter	33·1	4·4	37·9	47·6	54·8	24·6	19·9	18·8	25·9	267·0	74·1	15·2	177·7
4th quarter	34·9	4·1	37·9	45·6	49·6	21·2	19·9	18·0	25·3	256·5	64·3	15·4	176·8
1963 1st quarter	31·1	3·4	33·6	33·7	55·6	22·1	20·9	17·0	21·8	239·2	62·9	17·0	159·3
2nd quarter	33·9	4·4	36·6	31·7	56·5	24·3	20·0	19·4	25·3	252·1	67·7	20·0	164·4
3rd quarter	35·3	5·0	35·4	25·7	55·2	22·4	20·7	19·5	26·1	245·3	65·9	20·4	159·0
4th quarter	37·0	5·7	36·2	25·9	51·9	22·5	23·0	17·6	30·6	250·4	67·7	20·3	162·4
1964 1st quarter	38·2	5·9	38·1	24·7	61·4	20·3	28·4	19·2	27·8	264·0	73·8	23·0	167·2
2nd quarter	39·1	4·4	41·5	24·8	63·6	22·1	30·9	19·1	31·8	277·3	77·7	23·1	176·5
3rd quarter	42·4	3·6	45·7	25·5	61·1	16·6	30·4	21·9	31·2	278·4	75·2	22·2	181·0
4th quarter													

NOTE: Separate figures are now shown in Table 2 for Mineral Oil Refining and for Chemicals, Paint and Printing Ink. There have been, in consequence, some minor changes to the 1963 figures previously published under the heading 'Chemicals and Allied Industries'.

(Continued on next page)

Table 3. Fixed capital expenditure in the distributive and service industries at 1958 prices seasonally adjusted (a) (c) (d)

£ million

Period	ANALYSIS BY INDUSTRY GROUP					ANALYSIS BY TYPE OF ASSET		
	Wholesale Distribution	Retail Distribution	Shipping	Other Industries	Total			
	Standard Industrial Classification							
	810, 831, 832	820	704	XVII, Part of XIX, XXI, Part of XXII and XXIII	XVII, Part of XIX, XX, Part of XXI, Part of XXII and XXIII	Building Work	Vehicles	Plant and Machinery
1958	73	130	147	338	688	204	307	177
1959	92	163	161	376	792	236	346	210
1960	100	175	158	440	873	270	381	222
1961	105	195	128	503	931	313	365	253
1962	116	187	102	492	897	328	322	247
1963	126	204	83	548	961	329	348	284
1959 1st quarter	24	38	36	82	180	56	77	47
2nd quarter	22	40	48	96	206	57	96	53
3rd quarter	23	40	34	93	190	58	79	53
4th quarter	23	45	43	105	216	65	94	57
1960 1st quarter	22	43	40	115	220	70	95	55
2nd quarter	25	43	43	108	219	67	98	54
3rd quarter	26	44	38	104	212	64	92	56
4th quarter	27	45	37	113	222	69	96	57
1961 1st quarter	28	44	39	126	237	75	99	63
2nd quarter	27	47	27	125	226	78	85	63
3rd quarter	26	52	32	129	239	79	97	63
4th quarter	24	52	30	123	229	81	84	64
1962 1st quarter	25	52	25	114	216	78	78	60
2nd quarter	27	48	32	121	228	81	85	62
3rd quarter	33	46	21	134	234	91	79	64
4th quarter	31	41	24	123	219	78	80	61
1963 1st quarter	29	52	23	127	231	80	84	67
2nd quarter	32	47	16	135	230	81	81	68
3rd quarter	31	51	24	137	243	82	88	73
4th quarter	34	54	20	149	257	86	95	76
1964 1st quarter	35	58	23	148	264	81	98	85
2nd quarter	34	62	25	142	263	83	96	84
3rd quarter	35	60	33	159	287	91	109	87
4th quarter								

Table 4. Industry's fixed capital expenditure at current prices (a)

£ million

Period	Manufacturing Industry (b)	Distributive and Service Industries (c)	Total
1958	922	688	1,610
1959	867	782	1,649
1960	1,021	863	1,884
1961	1,239	934	2,173
1962	1,168	927	2,095
1963	1,067	993	2,060
1964			
1959 1st quarter	203	174	377
2nd quarter	209	200	409
3rd quarter	212	179	391
4th quarter	243	229	472
1960 1st quarter	221	212	433
2nd quarter	236	212	448
3rd quarter	271	202	473
4th quarter	293	237	530
1961 1st quarter	273	233	506
2nd quarter	304	223	527
3rd quarter	331	230	561
4th quarter	331	248	579
1962 1st quarter	286	218	504
2nd quarter	294	232	526
3rd quarter	290	235	525
4th quarter	298	242	540
1963 1st quarter	241	234	475
2nd quarter	266	235	501
3rd quarter	267	242	509
4th quarter	293	282	575
1964 1st quarter	271	272	543
2nd quarter	301	273	574
3rd quarter	312	292	604
4th quarter			

Notes relating to tables 1, 2, 3 and 4

(a) Expenditure on vehicles (including ships) and plant and machinery less receipts from sales of these assets, and on new building work.

(b) Standard Industrial Classification Orders III to XVI.

(c) Standard Industrial Classification Order XVII (Construction); XIX (Transport and Communication) excluding 701 – Railways, 705 – Port and Inland Water Transport, 706 – Air Transport and 707 – Postal Services and Telecommunications; XX (Distributive Trades); XXI (Insurance, Banking and Finance) excluding savings departments of the Post Office and Trustee Savings Banks; XXII (Professional and Scientific Services) excluding 872 – Educational Services and 874 – Medical and Dental Services; and XXIII (Miscellaneous Services).

(d) Care should be taken in using the industry figures in tables 2 and 3 because of the margins of error involved in the quarterly seasonal adjustments.

Industry's investment intentions for 1965 and 1966

COMPANIES CONTRIBUTING to the Board of Trade's regular quarterly inquiry into capital expenditure supplied forecasts during November and December 1964 of their expected capital expenditure in the year 1965. These forecasts indicate that private industry and commerce (manufacturing industry together with the distributive and service trades) were expecting to spend, on capital account, about 10 per cent more in 1965 than in 1964. This expected increase is very much the same as the earlier and more tentative estimate based on forecasts provided by contributors during August and September of last year (see *Board of Trade Journal* of October 16, 1964).

It is, as usual, to be stressed that there are in the nature of the contributors' forecasts, uncertainties in interpreting their significance. Past experience has shown that forecasts given in November/December for the year ahead can be substantially revised upwards or downwards as the year goes on, with significant effects on the estimates of the expected change in expenditure made from these forecasts. On this occasion there is added uncertainty about what the effect may be on investment plans of the change in Bank Rate and associated Government measures.

Subject to these qualifications the latest estimate suggests that private industry's capital expenditure will continue to rise during 1965. The present upturn in the capital expenditure cycle began in 1963 since when, from the low point reached at the end of the previous downturn expenditure has risen more or less steadily up to the third quarter of 1964, the latest for which figures of actual expenditure are available. Capital expenditure in 1964 as a whole will in all likelihood, be above that in the previous peak year of 1961 and the further increases implied by contributors' latest forecasts will, on present plans and intentions, result in 1965's expenditure being well above this previous peak.

The increase of about 10 per cent estimated from contributors' plans and intentions at the end of last year applies equally to manufacturing industry and to the distributive and service trades. It is, however, to be noted that, partly because the coverage of contri-

butors in the distributive and service trades is smaller than for manufacturing industry and partly because the discipline of forward budgeting is often applied less rigorously by companies in these trades, there is greater uncertainty in the interpretation of the forecasts in this sector.

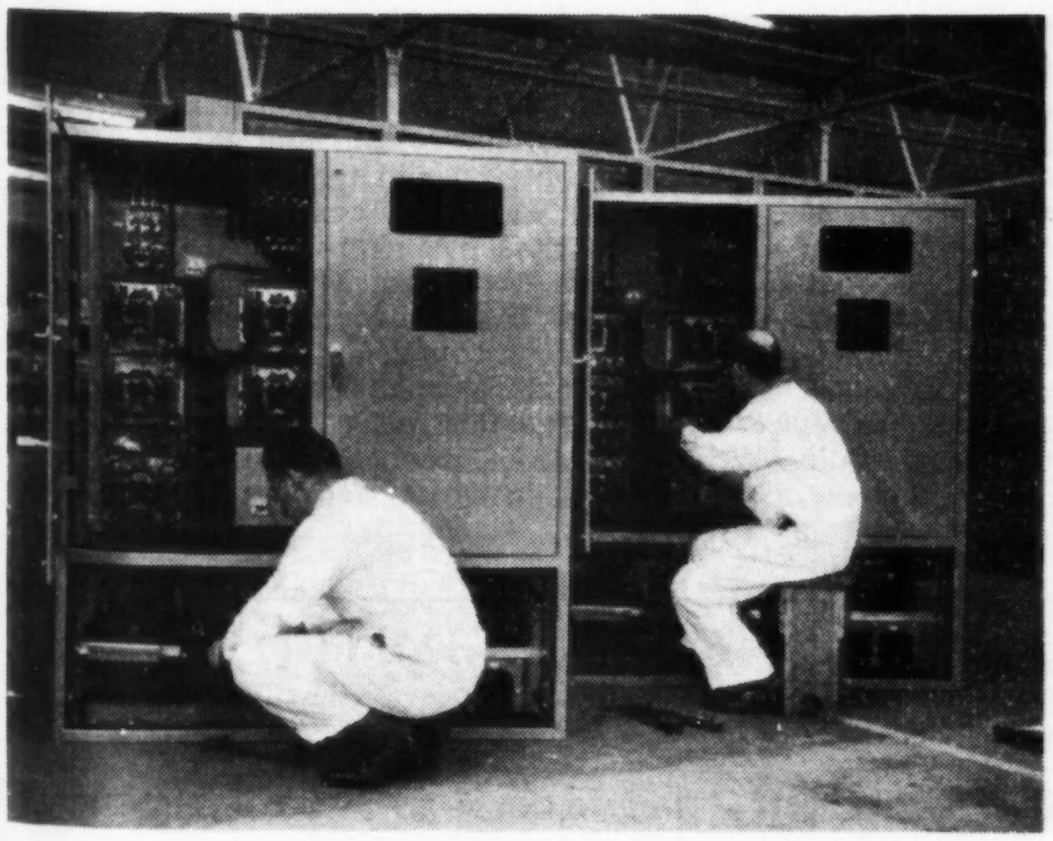
Within manufacturing industry the forecasts of the chemicals group of industries suggest that there will be in this sector a further significant increase in investment on top of the large increase which can be seen in the figures up to the third quarter of 1964. Other industry groups forecasting sizeable increases are the textiles, leather and clothing group (whose investment had also risen in 1964) and the motor vehicles part of the vehicles group.

Among the distributive and service industries outstanding features of contributors' forecasts of 1965 expenditure are a dullness in the property sector and some buoyancy in the catering trade.

Expenditure in 1966

Contributing companies also supplied during November and December 1964 forecasts of their expected capital expenditure in the year 1966. This is the second occasion on which the Board of Trade's investment intentions inquiry has looked so far ahead. This more forward looking exercise was attempted for the first time in November/December 1963, when contributors gave estimates of their expected expenditures in 1965 (see article of *Board of Trade Journal* of January 17, 1964). As might be expected these forecasts are very provisional and, as is shown by a comparison on the returns made in November/December 1963 with those subsequently made in August/September 1964 and November/December 1964 by the same companies of their plans as regards investment in 1965, the early forecasts can be drastically altered as time passes. Since the investment intentions inquiry was begun experience has shown that, in most circumstances though not in all, the appropriate way to use contributors' forecasts is to compare them, in the aggregate, with the comparable forecasts received a year earlier. Because this simple comparison has not in the past been found to be appropriate in all circumstances there is real uncertainty about the suitability of its use on this occasion. There is needed, of course, some further years' experience which will show how, in differing circumstances, these early forecasts behave in regard to the out-turn of expenditure. At the present juncture the margin of uncertainty is such that all that can be said about the forecasts for 1966 is that they appear to imply that industry's plans and intentions for investment in 1966 as reported at the end of 1964 were as great as, perhaps somewhat greater than those for 1965.

REACTOR PANELS FOR MAURITIUS



At the Bedford works of Brookhirst Igranic (MI Group) engineers assemble two reactor control panels. They are being supplied to Thomas Broadbent's, of Huddersfield, manufacturers of centrifugals, for a sugar factory in Mauritius.

The best way to these EXPORT MARKETS

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WILLIAMS DEACON'S BANK

Annual Report and Statement of the Chairman Mr. Kenneth G. Holden

"Steady and Effective Progress"

The Annual General Meeting of Williams Deacon's Bank Limited will be held on Thursday, February 11, 1965, in Manchester.

In his statement circulated with the Report and Accounts for the year ended December 31, 1964, Mr. Holden paid tribute to his predecessor, Sir Eric Carpenter, who, while remaining on the Board of Directors, had relinquished his office as Chairman at the last General Meeting, and expressed appreciation of the services of Mr. Rudolph E. F. de Trafford, who had intimated that he did not wish to seek re-election. He welcomed to the Board Mr. Ronald Michael Thwaites and Sir Peter Geoffrey Roberts, whose wide experience would be most valuable to the Bank. During the year Mr. Mallory and Mr. Upton had retired as General Managers, positions which they had held with distinction, and Mr. Leslie Fletcher had been appointed to succeed them.

NEW BRANCHES

Branches of the Bank had been opened at Manchester Royal Infirmary, Withington Hospital (Manchester), Cambridge, Croydon, Guildford, Shrewsbury and Winchester, while at Wilmslow, Cheshire, a second Branch had been opened at Water Lane. Branches at Park Green (Macclesfield), Poulton-le-Fylde, Sheffield Moor, South Elmsall, West Didsbury and Withington had been rebuilt and premises acquired at Littlemoor (Chesterfield), Northampton, Penwortham (Preston) and Shrewsbury Cattle Market where Branches would be established as soon as possible. To provide for Executor and Trusteeship work in Jersey a subsidiary company, Williams Deacon's Bank Executor and Trustee Company (Channel Islands) Limited, had been formed.

During the year an order had been placed for an I.B.M. System 360 Computer which was expected to be operational in the spring of 1966 at the London (City) Office. No matter to what extent new and expensive machinery was installed, however, the Bank remained entirely dependent upon a loyal and enthusiastic staff to sustain and develop the business of the Bank and to them Mr. Holden extended a special word of thanks for their services during the past year.

Many opportunities for promotion in the Bank were opening up for young men and merit was increasingly being recognised by awards for ability and enterprise. Not for many years had banking provided such bright prospects for talented young men and women.

THE ECONOMIC SCENE

In looking at the nation's economic position, the past year, in terms of production and overseas trade, had been one of disappointed hopes with the year-end presenting a disturbing picture of rising wages, increased taxation and high interest rates with disappointing exports and diminishing reserves. Moreover the background to the scene was one of considerable uncertainty, a condition which, to a country having in sterling a reserve currency and being overdrawn against many of the major world financial centres, could only make for very serious difficulties.

NATION'S PROBLEM

The problem confronting the nation was clear. If we were to obtain a higher standard of living there was only one way open; that was to increase our foreign earnings in order to pay those who supplied us with a large part of our food and vital raw materials. To achieve this, the greatest measure of co-operation from labour and employer alike was essential. One ray of hope would be the negotiation of a workable prices and incomes policy, on which a Statement of Intent of the negotiating parties had been agreed. The policy would no doubt feel the strain of full employment and full order books but

the Statement of Intent was certainly an attempt to deal with the underlying difficulties of our position. It would be a happy conclusion if the negotiations resulted in purchasing power being regarded as of more importance than the level of wages, and if home demand could be contained in order to derive the maximum benefit from exports. In this field it was important that producers should know that plans whose execution might often extend over a considerable period of time could be carried out with confidence and that fiscal or other policies would not be altered in such a way as to render those plans less attractive before they were completed. Above all, Mr. Holden said, it was essential for the nation to have new confidence in itself. Without that, it could not convince others of its ability to succeed and to that confidence, soundly based, he looked as a first step towards recovery.

WILLIAMS DEACON'S BANK LIMITED
Head Office: Mosley Street · Manchester
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Industry's stocks in third quarter of 1964

FINAL and revised estimates show that the volume of stocks held by manufacturers and distributors, after allowing for seasonal factors, rose by £96 million during the third quarter of 1964, or by substantially less than in the previous quarter, when they rose by £132 million. Most of this third quarter increase of £96 million was attributable to the stocks and work in progress of manufacturing industry (up £77 million), which had risen much more steeply (by £126 million) in the second quarter. Stocks held by wholesalers rose by £6 million in the third quarter, or by about the same amount as in the previous quarter. Retailers' stocks increased by £13 million after remaining virtually unchanged in the two preceding quarters.

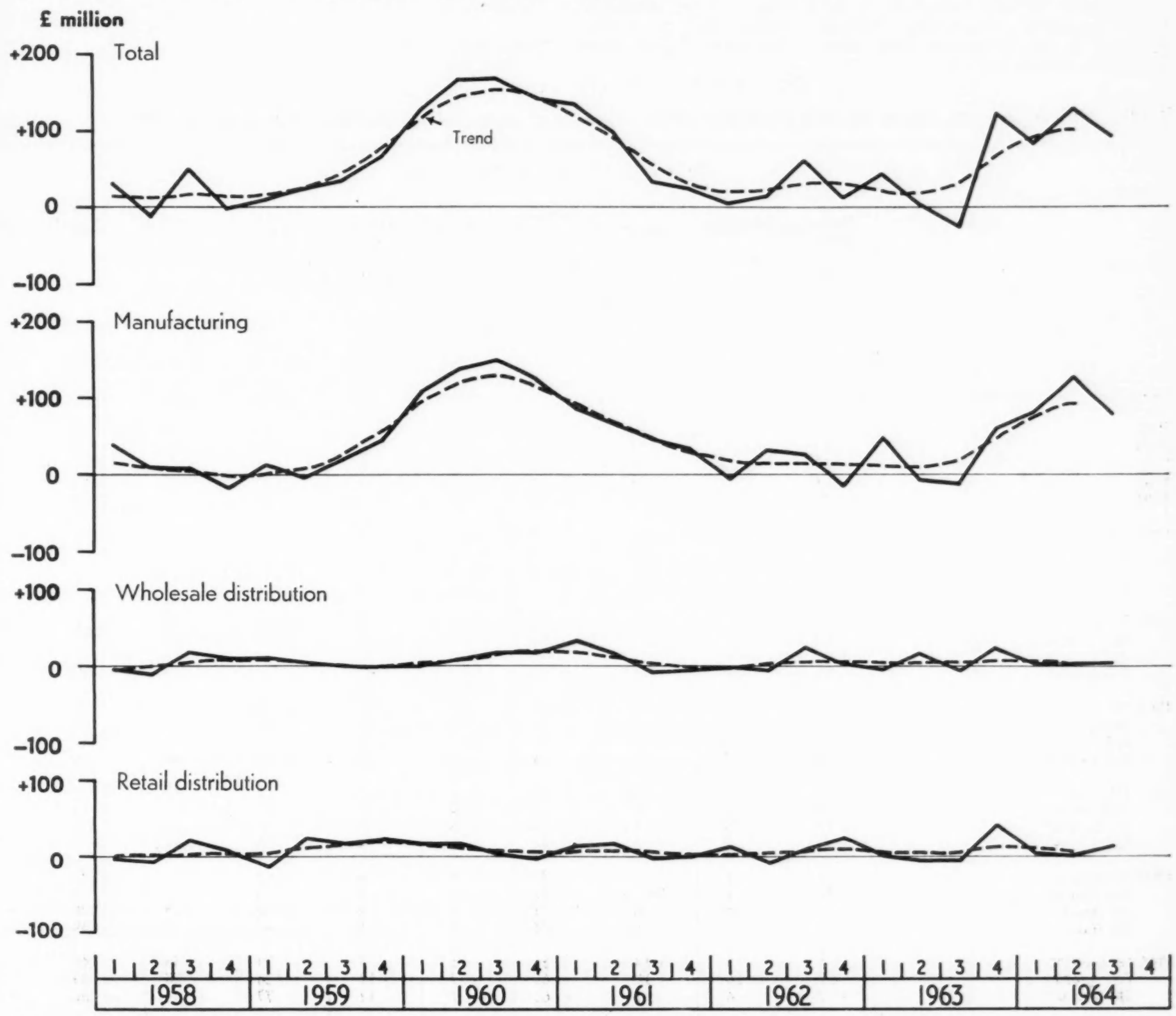
The figures for wholesalers' stocks have been revised, since they were last published, to take account of the results of the 1963 Inquiry into the Distributive and Service Trades. Revisions have also been made on account of a re-calculation of all the seasonal factors used in both the manufacturers' and wholesalers' stocks series. The effect of these revisions is discussed at the end of this article. These revisions have tended to reduce the irregularity of the basic quarterly figures, while making very little difference to the underlying trend of industry's stockbuilding.

Manufacturing industry

Revised estimates for the third quarter of 1964 show that the total volume of manufacturers' stocks and work in progress (at 1958 prices seasonally adjusted) rose by £77 million – as compared with an increase of £126 million in the second quarter. Some £12 million of the difference between this figure and that published (a rise of £47 million) six weeks ago, is due to contributors' returns received after the provisional calculation. The balance of the difference (£18 million) represents changes brought about by the re-calculation of the seasonal adjustments used in this series –

Continued on next page

Changes in industry's stocks at 1958 prices, seasonally adjusted



to which fuller reference is made at the end of this article. As the chart indicates, manufacturers' stockbuilding, after continuing at a fairly steady low rate during 1962 and the early part of 1963, began to rise rapidly with large increases at the end of 1963 and in the first half of 1964. The latest figure suggests that the underlying trend may now have passed its peak, but until the figures for a further quarter are available this will not be certain.

Manufacturers' finished goods stocks rose £38 million in the third quarter (compared with a rise of £59 million in the previous quarter): work in progress rose £36 million (at much the same rate as in recent quarters), while stocks of materials and fuel increased by only £3 million (compared with an increase of £28 million in the second quarter). As may be seen from the figures in Table 2 nearly the whole of the increase in stocks and work in progress during the third quarter occurred in the 'engineering, shipbuilding and vehicles' sector.

The ratio of manufacturers' total stocks to their output, which rose fairly steeply in the second quarter of 1964 (stocks having risen sharply at a time when manufacturing output was remaining stationary), rose again, significantly, in the third quarter (when the Index of Production of all manufacturing industries declined slightly). By the third quarter this ratio had risen to a level similar to its average level over the last nine years. The series for manufacturers' stocks (revised) and for their output, as well as the ratio of the former to the latter, are shown – in rounded index number form – at the end of this article, with a chart to illustrate the markedly cyclical behaviour of the figures. A fuller discussion of the complex relationship between stocks and production appeared in the November 1964 issue of *Economic Trends* (HM Stationery Office, 6s.).

Text continued on page 170

Table 1. Changes in the volume of industry's stocks at 1958 prices seasonally adjusted[a]

£ million

Period	(b) Manufacturing	(c) Wholesale distribution	(d) Retail distribution	(e) Total
Level of stocks at December 31, 1959	4,952	810	951	6,713
1959	+ 73	+15	+49	+137
1960	+520	+48	+37	+605
1961	+230	+36	+29	+295
1962	+ 33	+22	+39	+ 94
1963	+ 89	+29	+30	+148
1959 1st quarter	+ 12	+12	—14	+ 10
2nd quarter	— 4	+ 5	+23	+ 24
3rd quarter	+ 19	— 1	+17	+ 35
4th quarter	+ 46	— 1	+23	+ 68
1960 1st quarter	+109	N/C	+18	+127
2nd quarter	+138	+11	+18	+167
3rd quarter	+148	+19	+ 2	+169
4th quarter	+125	+18	— 1	+142
1961 1st quarter	+ 86	+35	+14	+135
2nd quarter	+ 66	+17	+17	+100
3rd quarter	+ 45	— 9	— 2	+ 34
4th quarter	+ 33	— 7	N/C	+ 26
1962 1st quarter	— 8	N/C	+13	+ 5
2nd quarter	+ 31	— 7	— 8	+ 16
3rd quarter	+ 26	+26	+10	+ 62
4th quarter	— 16	+ 3	+24	+ 11
1963 1st quarter	+ 49	— 4	N/C	+ 45
2nd quarter	— 9	+17	— 5	+ 3
3rd quarter	— 12	— 7	— 6	— 25
4th quarter	+ 61	+23	+41	+125
1964 1st quarter	+ 79	+ 2	+ 4	+ 85
2nd quarter	+126	+ 5	+ 1	+132
3rd quarter	+ 77	+ 6	+13	+ 96

Table 2. Changes in the volume (at 1958 prices-seasonally adjusted) of stocks held by manufacturing industry [a] [b] [f]

£ million

Period	ANALYSIS BY INDUSTRY GROUP							ANALYSIS BY TYPE OF ASSET		
	Food, drink and tobacco	Chemicals and allied industries	Metal manufacture	Engineering, shipbuilding and vehicles	Textiles, leather and clothing	Other manufacturing industries	Total all manufacturing industries			
	Standard Industrial Classification Orders							Materials and fuel	Work in progress	Finished goods
	III	IV	V	VI-IX	X-XII	XIII-XVI	III-XVI			
Level of stocks at December 31, 1959	720	456	384	2,295	606	491	4,952	1,940	1,785	1,227
1959	+26	+31	—10	+ 36	—12	+ 2	+ 73	+ 16	+ 47	+ 10
1960	+52	+41	+73	+250	+42	+62	+520	+225	+127	+168
1961	+18	+15	+ 7	+134	+23	+33	+230	+ 51	+ 84	+ 95
1962	+31	+ 2	—24	+ 29	— 6	+ 1	+ 33	— 50	+ 32	+ 51
1963	+57	+ 1	+ 5	+ 58	—27	— 5	+ 89	— 10	+ 97	+ 2
1959 1st quarter	+13	+14	—10	— 3	— 5	+ 3	+ 12	— 1	N/C	+ 13
2nd quarter	+14	+ 5	+ 2	— 11	—11	— 3	— 4	+ 14	+ 3	— 21
3rd quarter	+ 1	+ 3	— 5	+ 19	— 2	+ 3	+ 19	— 5	+ 18	+ 6
4th quarter	— 2	+ 9	+ 3	+ 31	+ 6	— 1	+ 46	+ 8	+ 26	+ 12
1960 1st quarter	+ 7	+ 1	+16	+ 64	+13	+ 8	+109	+ 52	+ 23	+ 34
2nd quarter	+14	+15	+15	+ 64	+13	+17	+138	+ 62	+ 37	+ 39
3rd quarter	+ 9	+15	+27	+ 55	+26	+16	+148	+ 70	+ 22	+ 56
4th quarter	+22	+10	+15	+ 67	—10	+21	+125	+ 41	+ 45	+ 39
1961 1st quarter	+ 9	+10	+12	+ 33	+ 5	+17	+ 86	+ 39	+ 39	+ 8
2nd quarter	— 2	+ 5	+ 1	+ 30	+13	+19	+ 66	+ 17	+ 20	+ 29
3rd quarter	+12	+ 3	— 5	+ 30	N/C	+ 5	+ 45	+ 15	+ 15	+ 15
4th quarter	— 1	— 3	— 1	+ 41	+ 5	— 8	+ 33	— 20	+ 10	+ 43
1962 1st quarter	+ 9	— 5	—12	+ 10	+ 1	—11	— 8	— 13	— 1	+ 6
2nd quarter	+10	— 3	— 4	+ 29	— 2	+ 1	+ 31	N/C	+ 21	+ 10
3rd quarter	+12	+ 6	— 9	+ 18	— 4	+ 3	+ 26	— 14	+ 15	+ 25
4th quarter	N/C	+ 4	+ 1	— 28	— 1	+ 8	— 16	— 23	— 3	+ 10
1963 1st quarter	+ 2	+ 8	+ 5	+ 29	— 9	+14	+ 49	— 7	+ 33	+ 23
2nd quarter	+21	— 4	N/C	— 12	— 5	— 9	— 9	— 8	+ 5	— 6
3rd quarter	— 1	— 6	— 6	+ 7	— 4	— 2	— 12	— 15	+ 20	— 17
4th quarter	+35	+ 3	+ 6	+ 34	— 9	— 8	+ 61	+ 20	+ 39	+ 2
1964 1st quarter	+ 1	+ 5	+14	+ 51	+11	— 3	+ 79	+ 39	+ 46	— 6
2nd quarter	—11	+16	+18	+ 65	+27	+11	+126	+ 28	+ 39	+ 59
3rd quarter	+ 7	+ 4	— 5	+ 61	— 1	+11	+ 77	+ 3	+ 36	+ 38

(*Tables continued on page* 169)

Table 3. Changes in the volume (at 1958 prices seasonally adjusted) of stocks held by wholesalers [a] [f]

£ million

S.I.C. M.L.H.			1st quarter	2nd quarter	3rd quarter	4th quarter	Year	Level of stocks at December 31, 1959
810	Wholesale distributors	1959	+ 9	N/C	—10	+11	+10	548
		1960	— 1	+10	+15	+ 2	+26	
		1961	+28	+10	— 2	—10	+26	
		1962	— 6	—11	+16	+ 5	+ 4	
		1963	— 4	+11	—13	+19	+13	
		1964	— 2	+ 4	+ 7			
831	Dealers in coal, builders' materials, etc.	1959	— 1	+ 5	+ 4	— 3	+ 5	77
		1960	N/C	+ 1	N/C	+ 3	+ 4	
		1961	+ 1	+ 1	— 1	— 1	N/C	
		1962	+ 1	N/C	+ 2	+ 1	+ 4	
		1963	+ 2	+ 2	— 2	+ 3	+ 5	
		1964	+ 1	— 1	+ 5			
832	Dealers in industrial materials and machinery	1959	+ 4	N/C	+ 5	— 9	N/C	185
		1960	+ 1	N/C	+ 4	+13	+18	
		1961	+ 6	+ 6	— 6	+ 4	+10	
		1962	+ 5	+ 4	+ 8	— 3	+14	
		1963	— 2	+ 4	+ 8	+ 1	+11	
		1964	+ 3	+ 2	— 6			
	Total wholesalers	1959	+12	+ 5	— 1	— 1	+15	810
		1960	N/C	+11	+19	+18	+48	
		1961	+35	+17	— 9	— 7	+36	
		1962	N/C	— 7	+26	+ 3	+22	
		1963	— 4	+17	— 7	+23	+29	
		1964	+ 2	+ 5	+ 6			

Table 4. Changes in the value (at book values) of stocks held by manufacturers and distributors [a]

£ million

		1st quarter	2nd quarter	3rd quarter	4th quarter	Year	Level of stocks at December 31, 1959
Manufacturing (b)	1959	+ 27	+ 13	+ 17	+ 80	+137	5,048
	1960	+128	+181	+128	+161	+598	
	1961	+112	+104	+ 47	+ 55	+318	
	1962	+ 9	+ 29	+ 14	+ 33	+ 85	
	1963	+ 67	N/C	+ 10	+152	+229	
	1964	+120	+180	+108			
Wholesale distribution (c)	1959	+ 17	+ 5	+ 25	— 25	+ 22	819
	1960	+ 7	+ 18	+ 52	— 22	+ 55	
	1961	+ 44	+ 20	+ 15	— 36	+ 43	
	1962	+ 6	+ 5	+ 40	— 19	+ 32	
	1963	— 6	+ 23	+ 23	+ 8	+ 48	
	1964	+ 12	+ 26	+ 45			
Retail distribution (d)	1959	+ 20	+ 22	— 3	+ 6	+ 45	949
	1960	+ 68	+ 15	— 19	— 20	+ 44	
	1961	+ 79	+ 25	— 23	— 20	+ 61	
	1962	+ 89	— 5	— 13	+ 1	+ 72	
	1963	+ 75	— 22	— 35	+ 20	+ 38	
	1964	+ 82	+ 2	— 12			
Total (e)	1959	+ 64	+ 40	+ 39	+ 61	+204	6,816
	1960	+203	+214	+161	+119	+697	
	1961	+235	+149	+ 39	— 1	+422	
	1962	+104	+ 29	+ 41	+ 15	+189	
	1963	+136	+ 1	— 2	+180	+315	
	1964	+214	+208	+141			

Notes relating to Tables 1-4.

(a) The estimates are shown to the nearest £ million, but should not be regarded as accurate to this degree.

(b) Standard Industrial Classification Orders II-XVI.

(c) S.I.C. Minimum List Headings 810, 831, 832.

(d) S.I.C. Minimum List Heading 820.

(e) S.I.C. Orders III-XVI and XX.

(f) Care should be taken in using the industry figures in Tables 2 and 3 because of the margins of error involved in the quarterly seasonal adjustments.

The relationship of manufacturers' stocks to manufacturing production

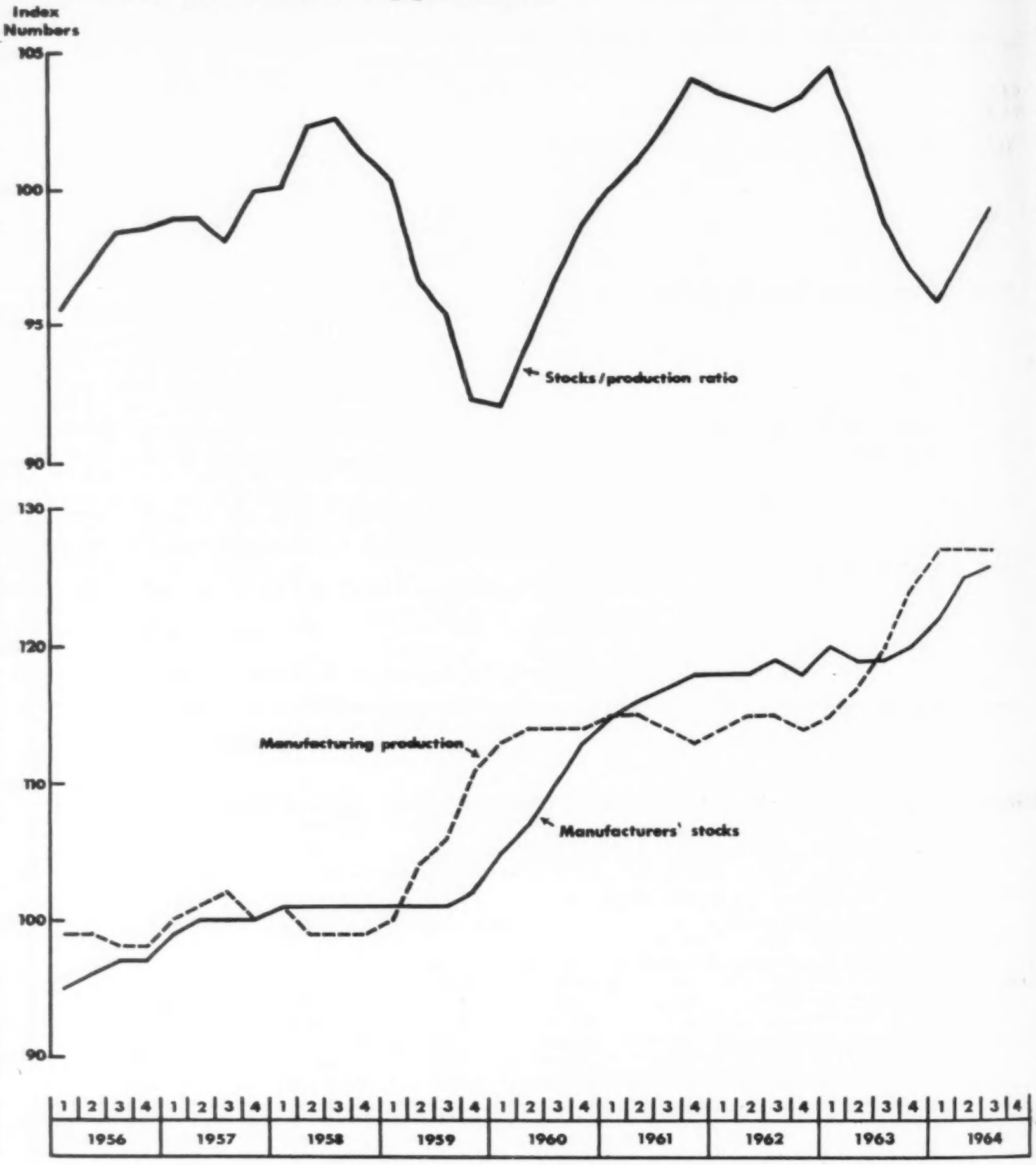
Period (quarters)		Index numbers 4th quarter 1957 = 100 seasonally adjusted (1)		
		Stock levels (at 1958 prices)	Production (with 1958 net output weight) (2)	Ratio of stocks to production (3)
1956	1	95	99	95·6
	2	96	99	97·1
	3	97	98	98·4
	4	97	98	98·6
1957	1	99	100	98·9
	2	100	101	99·0
	3	100	102	98·1
	4	100	100	100·0
1958	1	101	101	100·1
	2	101	99	102·3
	3	101	99	102·6
	4	101	99	101·4
1959	1	101	100	100·6
	2	101	104	97·0
	3	101	106	95·7
	4	102	111	92·3
1960	1	105	113	92·3
	2	107	114	94·6
	3	110	114	96·8
	4	113	114	98·8
1961	1	115	115	100·3
	2	116	115	101·4
	3	117	114	102·7
	4	118	113	104·1
1962	1	118	114	103·5
	2	118	115	103·2
	3	119	115	103·2
	4	118	114	103·5
1963	1	120	115	104·4
	2	119	117	102·0
	3	119	120	99·1
	4	120	124	97·1
1964	1	122	127	95·8
	2	125	127	97·7
	3	126	127	99·4
	4			

Notes

(1) The index numbers of the level of stocks relate to the end of each quarter; the index of production refers to production during the quarter.

(2) The index of production with 4th quarter 1957 as the base has been converted arithmetically from the official 1958 based index linked to estimates for 1956 and 1957 derived from the previous index based on 1954.

(3) The index numbers of the stocks-production ratios are calculated from unrounded estimates of the data in the previous two columns.



Wholesalers' stocks

Revised estimates show that the volume of stocks (at 1958 prices seasonally adjusted) held by wholesalers increased by only £6 million in the third quarter of 1964, after rising by a similar amount (£5 million) in the second quarter. As may be seen from Table 3, there was comparatively little change in the stocks of any particular class of wholesaler: stocks of wholesale distributors as well as of dealers in coal, builders' materials, etc. (Minimum List Headings 810 and 831) both rose slightly, while stocks of dealers in industrial materials and machinery (MLH 832) fell slightly.

The figures in this series have been revised since they were last published. The book value figures for the year 1963 have been altered to take account of the results of the Inquiry into the Distributive and Service Trades for 1963 (published in the *Board of Trade Journal* of January 1, 1965). This revision has the effect of increasing the change in total wholesalers' stocks in 1963, at book values, by £16 million (from £32 million to £48 million), with stocks of wholesale distributors (Minimum List Heading 810) rising more than was previously shown, stocks of dealers in coal, builders' materials, etc. (MLH 831), rising less than was previously shown – and stocks of dealers in industrial materials and machinery (MLH 832) remaining unaltered. These revisions to the annual figures have been carried through to the quarterly figures for 1963 and, accordingly, the 1964 book value figures have also been slightly revised. The equivalent quarterly figures, at 1958 prices, have, in consequence, also had to be re-calculated prior to seasonal adjustment. Finally, a new seasonally adjusted series has been calculated – as is more fully described at the end of this article.

Retailers' stocks

The volume of retailers' stocks rose by £13 million in the third quarter of 1964, after remaining virtually unchanged in the preceding two quarters.

The estimates of retailers' stocks are at present being re-calculated to take fuller account of the results of the 1961 Census of Distribution. As part of this re-calculation the figures for 1962 and 1963 are also being revised to agree with the results of the Inquiries into the Distributive and Service Trades for those years. It is hoped that the revised series will appear in the provisional article for the fourth quarter due to be published on March 12.

Retail stocks in November

THE VALUE OF retail stocks at the end of November was 6 per cent higher than the corresponding year earlier figure, the same increase as in October and compared with 8 per cent in September. After allowing for seasonal factors the level of the value of stocks showed a sharp increase compared with the level of the last three months, although too much should not be attached to the figures for a single month.

In volume terms stocks showed an increase of 4 per cent compared with a year earlier, the same as in October.

Estimates of changes in total retail stocks

(At cost at end of month). Index numbers (end 1956 = 100) and percentage changes on a year earlier.

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
(a) At current prices.												
1956. . .	96	100	101	102	102	100	97	95	101	109	114	100
1957. . .	100	105	107	109	110	107	104	103	107	117	123	107
1958. . .	105	109	111	112	112	109	106	106	110	119	123	109
1959. . .	108	111	112	114	115	114	111	109	114	123	129	115
1960. . .	113	119	123	124	126	125	120	118	123	131	136	120
1961. . .	119	124	129	131	132	131	126	124	128	136	142	125
1962. . .	124	128	135	137	139	135	132	130	133	144	151	133
1963. . .	130	134	142	142	143	139	135	133	135	147	157	137
1964. . .	139	141	147	150	149	148	139	143	146	156	167	
1961. . .	+5	+5	+5	+5	+4	+5	+5	+5	+4	+4	+4	+4
1962. . .	+5	+3	+5	+4	+6	+2	+4	+5	+4	+6	+7	+7
1963. . .	+5	+4	+5	+4	+3	+3	+2	+2	+1	+2	+4	+3
1964. . .	+6	+5	+4	+6	+4	+6	+4	+8	+8	+6	+6	
(b) At constant (Dec. 1956) prices.												
1956. . .	99	103	103	104	103	101	98	96	102	110	115	100
1957. . .	100	104	106	108	109	106	113	102	106	115	121	105
1958. . .	104	107	109	110	110	107	104	104	108	117	121	107
1959. . .	106	109	110	113	113	113	110	108	112	121	127	113
1960. . .	111	117	122	122	124	123	117	116	120	128	133	117
1961. . .	116	121	125	127	127	126	121	118	122	129	134	118
1962. . .	117	121	127	129	130	125	122	120	123	133	139	122
1963. . .	121	123	131	131	132	129	124	122	124	135	144	126
1964. . .	127	128	134	136	134	133	125	128	131	140	149	
1961. . .	+4	+3	+3	+3	+2	+3	+3	+2	+1	+1	+1	Nil
1962. . .	+1	Nil	+2	+2	+2	+1	Nil	+2	+1	+3	+4	+4
1963. . .	+3	+2	+3	+2	+2	+3	+2	+2	+1	+2	+3	+3
1964. . .	+5	+4	+2	+4	+2	+3	+1	+5	+6	+4	+4	

(A description of the basis and construction of these estimates was given on page 1288 of the *Board of Trade Journal* of December 19, 1958).

ANGLO-PERUVIAN TRADE BULLETIN

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INDUSTRY'S STOCKS, *continued*

The seasonal adjustments in this series will be re-calculated at the same time as the above changes are made.

Revisions to seasonal adjustments

All the seasonal adjustment factors used in the series for manufacturers' and wholesalers' stocks have been re-calculated since these series were last published. The calculations involved have previously been described in articles appearing in the *Board of Trade Journal* on July 6 and December 14, 1962, when it was explained that the method used is a variant of UNIVAC method II, as developed by J. Shiskin of the United States Bureau of the Census. This complex method necessitates the use of an electronic computer, and some slight modifications have been made in it since the last round of calculations—to take account of the special characteristics of these stocks series.

The new calculations have produced alterations to the quarterly figures back to 1959. In the years 1959 to 1961 these changes were, on the whole, smaller than in more recent years. In 1962, 1963 and 1964, particularly the two latter years, however, both the manufacturing and the wholesaling series have been more substantially altered due to a change in the seasonal pattern of stockbuilding.

In the manufacturing series, the main effect of these new calculations has been on the third quarter seasonal adjustment; the alterations in this adjustment have raised the third quarter 1963 adjusted figure by £21 million (from minus £33 million to minus £12 million) and the third quarter 1964 figure by £18 million. There has been little change in the figures for the second quarter, and reductions have occurred in the adjusted figures for the first and fourth quarters of both years. In the wholesalers' stocks series the new adjustments have had the effect, in recent years, of raising the adjusted figures for the first and the third quarters, while reducing the adjusted figures for the second and fourth quarters.

These changes have the effect of somewhat smoothing the basic quarterly series for manufacturing and for industry's total stocks, without significantly altering the underlying trends of either series.

Output of the wool textile industry

THE VOLUME of production in the wool textile industry in November was 7 per cent less than in November 1963.

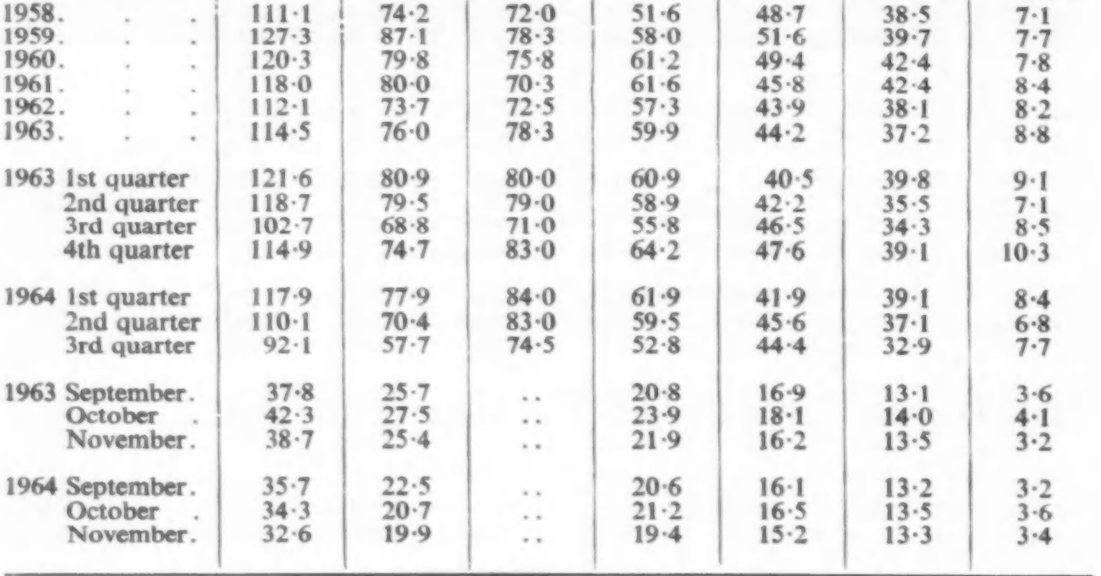
Figures issued by the Wool Industry Bureau of Statistics show that, when allowance is made for the length of the working month, the rate of production of tops was 22 per cent less than in November 1963 and the rates of deliveries of worsted yarn and woven fabrics (excluding blankets) were 11 and 4 per cent less respectively.

Comparison of the months January-November with the same period of 1963 showed that deliveries of woven fabrics (excluding blankets) remained at the same level, while the production of tops was 13 per cent less and deliveries of worsted yarn were 3 per cent less.

	Consumption	Production			Deliveries		
	Raw wool (clean weight)	Tops (*a*)	Woollen yarn (*b*)	Worsted yarn	Woven fabrics (excluding blankets) (*c*)		Blankets (*b*)
					Woollen	Worsted	
Quarterly average	Million lb.				Million sq. yds.		
1958	111·1	74·2	72·0	51·6	48·7	38·5	7·1
1959	127·3	87·1	78·3	58·0	51·6	39·7	7·7
1960	120·3	79·8	75·8	61·2	49·4	42·4	7·8
1961	118·0	80·0	70·3	61·6	45·8	42·4	8·4
1962	112·1	73·7	72·5	57·3	43·9	38·1	8·2
1963	114·5	76·0	78·3	59·9	44·2	37·2	8·8
1963 1st quarter	121·6	80·9	80·0	60·9	40·5	39·8	9·1
2nd quarter	118·7	79·5	79·0	58·9	42·2	35·5	7·1
3rd quarter	102·7	68·8	71·0	55·8	46·5	34·3	8·5
4th quarter	114·9	74·7	83·0	64·2	47·6	39·1	10·3
1964 1st quarter	117·9	77·9	84·0	61·9	41·9	39·1	8·4
2nd quarter	110·1	70·4	83·0	59·5	45·6	37·1	6·8
3rd quarter	92·1	57·7	74·5	52·8	44·4	32·9	7·7
1963 September	37·8	25·7	..	20·8	16·9	13·1	3·6
October	42·3	27·5	..	23·9	18·1	14·0	4·1
November	38·7	25·4	..	21·9	16·2	13·5	3·2
1964 September	35·7	22·5	..	20·6	16·1	13·2	3·2
October	34·3	20·7	..	21·2	16·5	13·5	3·6
November	32·6	19·9	..	19·4	15·2	13·3	3·4

(*a*) Including hair. (*b*) Estimated. (*c*) Woven woollen fabrics include fabrics which are mainly woollen by weight of components and, similarly, woven worsted fabrics include fabrics which are mainly worsted by weight of components.

MIDDLE EAST EXPORT TOUR



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Orders in the textile and clothing industries

THE VOLUME of orders-on-hand in the grouped textile and clothing industries increased seasonally in November, and at the end of the month was 6 per cent more than at the end of October.

Compared with a year earlier, deliveries in November were 1 per cent less, and net new orders received were 5 per cent less.

Changes in the rate at which orders are received should not by themselves be taken to imply similar sharp changes in production ; they may, for example, lead to changes in the length of order books or the level of stocks.

Textile and clothing industries (a)
Index numbers of the volume of total orders and deliveries (b)

	Orders-on-hand (end of period)	Net new orders (*c*)	Deliveries (*c*)
	April 1959 = 100	Average 1959 deliveries = 100	Average 1959 deliveries = 100
1960	136	103	103
1961	104	91	99
1962	100	92	93
1963	117	100	95
1963 1st quarter	100	95	94
2nd quarter	105	96	93
3rd quarter	100	89	93
4th quarter	117	118	102
1964 1st quarter	121	103	99
2nd quarter	125	100	96
3rd quarter*	113	83	93
1963 September	100	110	108
October	110	134	107
November	119	137	110
1964 September*	113	95	105
October*	119	128	109
November*	127	130	108

(*a*) Wool, hosiery (and other knitted goods), made-up clothing and the spinning, weaving and merchant converting section of the cotton and man-made fibre industries.
(*b*) At constant (average 1958) prices.
(*c*) These indices have been adjusted to allow for differences in the length of calendar months but not for holidays or for any other seasonal variations.
* Provisional.

Production in the cotton industry

THE VOLUME of production in the cotton industry in November was 4 per cent more than in November 1963.

Statistics issued by the Cotton Board show that in the period January-November 1964 the output of single yarn and the amount of yarn doubled were both 5 per cent more than in the same period of 1963. The yardage of cloth woven was 3 per cent more.

(*All figures are weekly averages*)

	Single-yarn (*a*)		Double-yarn		Woven cloth	
	Cotton yarn (*b*)	Spun man-made fibre yarns and mixture yarn, inc. waste	Cotton yarn	Other	Cotton	Man-made fibre and mixtures
	Million lb.				Million lin. yds.	
1958†	11·91	2·86	3·07	1·32	27·0	11·3
1959	11·66	2·92	3·18	1·49	24·7	11·4
1960	11·46	2·98	3·30	1·66	24·9	11·9
1961	10·66	2·55	2·82	1·52	23·8	11·7
1962	9·46	2·30	2·50	1·64	20·1	10·9
1963	9·40	2·44	2·53	2·06	19·5	10·8
1963 November	10·31	2·85	2·81	2·26	21·7	11·8
December	9·00	2·50	2·42	1·90	18·7	10·3
1964 January*	9·94	2·74	2·65	2·21	20·1	11·5
February	10·22	2·89	2·73	2·30	21·1	12·1
March*	9·39	2·63	2·49	2·15	19·5	11·3
April	10·35	2·94	2·79	2·45	21·1	12·5
May	10·23	2·87	2·70	2·42	20·7	12·1
June*	8·14	2·35	2·26	2·05	20·3	11·5
July	8·15	2·14	2·26	2·09	12·2	8·1
August	9·70	2·84	2·36	2·19	20·1	11·3
September*	9·63	2·79	2·56	2·31	19·2	11·6
October	10·37	3·14	2·76	2·49	20·9	12·6
November	10·35	3·19	2·83	2·50	21·2	12·8

(*a*) Spun in the cotton industry. (*b*) Including yarns wholly of cotton and of cotton waste, cotton yarn spun on condenser system and mixture yarns of cotton and cotton waste.
* Average of five weeks. † 53-week period.

Sales by wholesale textile houses

SALES BY Wholesale textile houses during November showed an increase of 3 per cent over a year earlier, after a decrease of 1 per cent in October and an increase of 4 per cent during the third quarter of 1964.

The value of stocks held at the end of November was 4 per cent higher than a year earlier.

Notes:

These statistics are prepared by The Textile Distributors' Association. Inquiries should be addressed to: The Secretary, The Textile Distributors' Association, 75 Cannon Street, London, E.C.4. (Tel. City 4444).

Total sales and stocks

Index numbers (average 1950 = 100) and percentage changes compared with a year earlier.

	Value of Sales (Total Home Trade)		Value of Stocks (at end period) (b)	
		%		%
1963 Year	108	+ 3	..	..
1963 4th quarter	137	+ 6	118	+5
1964 1st quarter	100	+ 9	145	+4
2nd quarter	101	+ 3	135	+6
3rd quarter	111	+ 4	153	+7
1964 January	76	+ 9	124	+4
February	96	+13	140	+3
March	127	+ 5	145	+4
April	109	+ 8	139	+6
May	98	— 6	140	+7
June	96	+10	135	+6
July	79	+ 2	142	+5
August	97	+ 4	155	+6
September	156	+ 5	153	+7
October	156	— 1	135	+5
November	136	+ 3	133	+4

Analysis by department

Percentage of corresponding values for 1963

	Sales (b)		Stocks (b)
	November	January-November	At end of November
Women's knitted outerwear, blouses and skirts	120·7	118·7	115·9
Women's coats, costumes, furs and raincoats	101·0	96·7	106·5
Women's underwear	106·4	94·7	100·7
Women's hose and children's socks	102·8	102·5	115·7
Women's millinery	106·0	101·9	105·1
Haberdashery, ribbons and wool	91·6	87·7	84·0
Children's wear	99·1	105·0	105·5
Men's and boys' shirts, pyjamas and outfitting	97·1	102·9	108·3
Gloves	98·0	96·8	133·2
Piece-goods and nets	97·7	109·9	83·7
Household textiles	103·6	99·4	93·5
Floor-coverings, furniture and hardware	99·6	105·8	104·1
Grand total (a)	103·0	104·1	103·6

Notes
(a) Including some items not included among the sub-headings. (b) Values at cost.

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INDUSTRIAL FILM CATALOGUE

A new (1964–65) *edition of the Central Office of Information industrial catalogue* Films for Industry *has been published. It contains* 793 *films and* 43 *filmstrips, which are available from the Central Film Library and its branch libraries in Scotland and Wales. The films and filmstrips listed – including* 182 *new films,* 112 *of them British – are intended for instruction and training and for the promotion of industrial productivity, health and safety. The films are selected with the help of an advisory panel on which both sides of industry are represented, in addition to some Government departments and sponsored bodies. The Board of Trade is a member of this panel.*

The catalogue is available from the Central Film Library, Government Building, Bromyard Avenue, London, W3. Price 4*s. post free.*

Registrations of British and foreign films

The following are details of films registered by the Board of Trade under the Films Act, 1960, during the week ended Friday, January 15, 1965.
Where the title appears in italics the film forms part of a series. Br/E indicates that the film is a British quota film.

Title of Film	Registered in the name of	Maker's Name	Registered No.	Playing Time Minutes	Date of Registration
		BRITISH			
Look at Life Series 24:					
Blood and Fire	Rank Film Distributors Ltd.	Rank Film Distributors Ltd.	Br/E 30049	9	January 11
By Bread Alone	,, ,,	,, ,,	Br/E 30050	9	January 11
Malta Milestone	,, ,,	,, ,,	Br/E 30051	9	January 11
Movietone News 1858	Twentieth Century-Fox Film Co. Ltd.	British Movietonews Ltd.	Br/E 29897	8	January 15
Movietone News 1858A	,, ,,	,, ,,	Br/E 29898	7	January 15
Pathe News 65-4	Warner-Pathe Distributors Ltd.	Associated British-Pathe Ltd.	Br/E 29948	8	January 15
Pathe News 65-5	,, ,,	,, ,,	Br/E 29949	8	January 15
		FOREIGN			
Is There a Doctor in the Mouse	Metro-Goldwyn-Mayer Pictures Ltd.	Metro-Goldwyn-Mayer Inc.	F 30052	7	January 11
Signpost to Murder	,, ,,	Marten Productions Inc.	F 30053	69	January 11
38-24-36	Gala Film Distributors Ltd.	Cinegai, S.p.a., Rome	F 30054	86	January 12
Crimson Circle	D.U.K. Films Ltd.	Rialto Film Preben Phillipsen,. Copenhagen, and Contantine Film G.m.b.h., Munich	F 30055	85	Janvary 13
The Pleasure Seekers	Twentieth Century-Fox Film Co. Ltd.	Twentieth Century-Fox Film Corp.	F 30056	107	January 13

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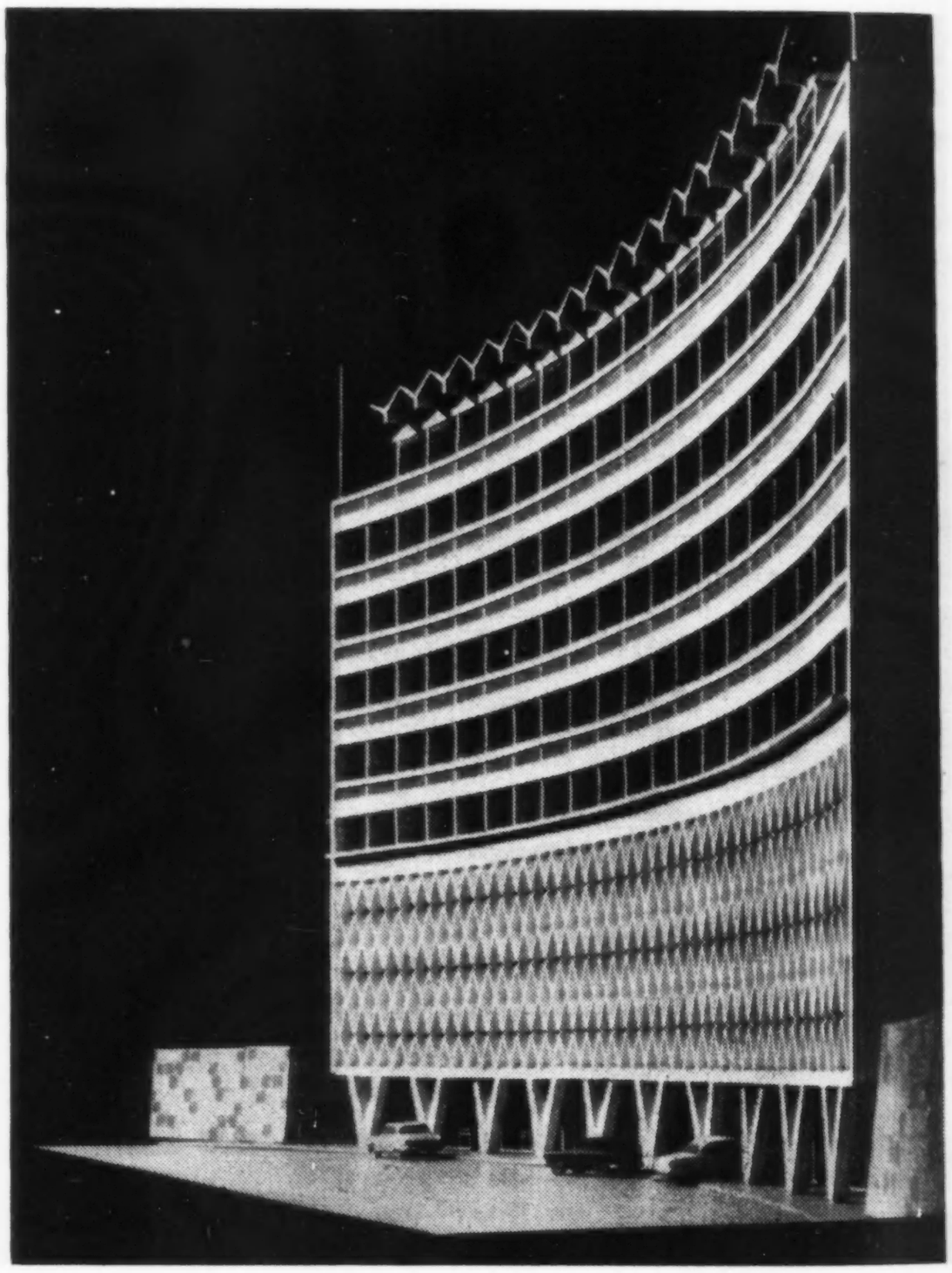

Model of a nine storey motor hotel which is being built by a British firm for Gibraltar in factory-made concrete components. The firm, Parcar (Gibraltar) Ltd., will erect the hotel on a site overlooking Algeciras Bay. This unusual export order will involve shipping over 2,500 tons of concrete units.

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Government surplus sales by auction

MINISTRY OF DEFENCE (ARMY DEPT.)

1965	Stores	Location	Auctioneers
Jan. 26-27 .	Machine tools, industrial equipment, watches, furniture and miscellaneous stores.	Ordnance Disposal Depot, Royal Arsenal, Woolwich, London, S.E.18.	Fuller, Horsey, Sons & Cassell (Dept. L), 10 Lloyds Avenue, London, E.C.3. (Tel. Royal 4861).
Feb. 2 .	Plant, machine tools; textiles and miscellaneous stores.	Ordnance Storage Depot, Yeadon, and other locations. (*Sale at Cheetham Town Hall, Manchester*).	J. H. Norris & Son (Dept. L), 380 Deansgate, Knott Mill, Manchester 3. (Tel. Deansgate 3176).
Feb. 9 .	Clothing; textiles; furniture; engineering tools and general stores; including: shirts, blankets, wool, hemp, fezes, Canadian rubber boots, leather ankle boots, rubber knee boots, motorcyclists jackets ,leggings, breeches and boots, anti-mosquito boots, Boys' black leather shoes,Women's brown leather shoes, leather soles, etc., vices, planes, spanners, twist drills, blocks and tackle, snatch blocks, collets micrometers and test equipment, pipe wrenches, taps and dies, nuts, bolts, screws, rivets and studs, torque wrenches, grindstones, etc., Steel pallets, cordage, clasp knives, safety razors, paint, Coventry Climax fire pumps, Collis trucks, 120 tons Interlocking steel runway plates; Office, dining and folding tables, cabinets, chairs, kitchen equipment, sauce tureens, carpets, mattresses, bicycles, oil stoves, etc.	Central Ordnance Depot, Bicester, Oxon .	Midland Marts Ltd. (Dept. L), Market Square, Bicester. (Tel. 73).
Feb. 16-18 .	Passenger, load carrying and dual purpose vehicles; earth moving, road making and mobile lifting equipment; plant ancillaries and spares; trailers and motor cycles.	Ordnance Storage and Disposal Depot, Ruddington, near Nottingham.	Walker, Walton & Hanson (Dept. L), Byard Lane, Bridlesmith Gate, Nottingham. (Tel. 54272).

Catalogues for each sale shown above may be obtained from the appropriate Auctioneer 14 days prior to the date of sale. Price 1s. 0d. (*Postal Orders only*).

SALE BY TENDER – MACHINE TOOLS

Extrusion Press 'Herlan' Model P.8. Gigant Horizontal.

Location: Dundee, Scotland.

Horizontal borers; horizontal and radial drills; tools and cutter grinder; centre lathe; planers; gear hobber, etc.

Locations: Portsmouth, Devonport, Gosport and Yeovilton. Application for Tender Forms should be made to: Ministry of Defence (AD), Directorate of Sales, 4 (b) (ii), First Avenue House, High Holborn, London, W.C.1. Tenders must be returned by the February 4, 1965. Permission to view on presentation of Tender Forms only.

MINISTRY OF DEFENCE (AIR FORCE DEPT.)

1965	Stores	Location	Auctioneers
Feb. 3 .	The sale will include mattresses (single and double), chairs (including Windsor, Suffolk, dining, etc.), dining, office and refectory tables; cupboards, sideboards, dressing tables, chests; household and cooking utensils, etc.	Royal Air Force, Melksham . . .	Tilley & Culverwell (AFD1), Phelps Chambers, The Square, Calne, Wilts. (Tel. Calne 3164)
Feb. 4 .	The sale will include miscellaneous stores and equipment (as Melksham sale but excluding mattresses).	Royal Air Force, Yatesbury . . .	Tilley & Culverwell (AFD 1), Phelps Chambers The Square, Calne, Wilts. (Tel. Calne 3164)
Feb. 10 .	Miscellaneous stores and equipment . .	No. 16 Maintenance Unit, Royal Air Force, Stafford.	South & Stubbs (AFD 1), 28 Eastgate Street, Stafford. (Tel. Stafford 2331).
Feb. 17 .	Miscellaneous stores and equipment . .	No. 7 Maintenance Unit, Royal Air Force, Quedgeley.	Bruton Knowles & Co. (AFD 1), Albion Chambers, King Street, Gloucester. (Tel. Gloucester 21267).

Catalogues for the above sales may be obtained within 14 days of the advertised date of the sale on application to the Auctioneers. Catalogues for sales held at Maintenance Units cost 1s. 0d. each (*Postal Orders only*), all other catalogues free.

(MINISTRY OF PUBLIC BUILDINGS AND WORKS)

1965	Description of Goods	Location	Auctioneers
Feb. 2 .	Office and miscellaneous furniture, engineering and electrical equipment, domestic, canteen and other equipment, etc.	Ministry of Public Building and Works, Supplies Division Store, Shed 10, Site 1, Kidbrooke Park Road, London, S.E.3.	Hollingsworths, 6 Snow Hill (2nd Floor), Holborn Viaduct, London, E.C.1. (Tel. City 1718 and 1828).

Catalogues, price 6d., are obtainable from the auctioneers. View days: day preceding the sale and morning of the sale.

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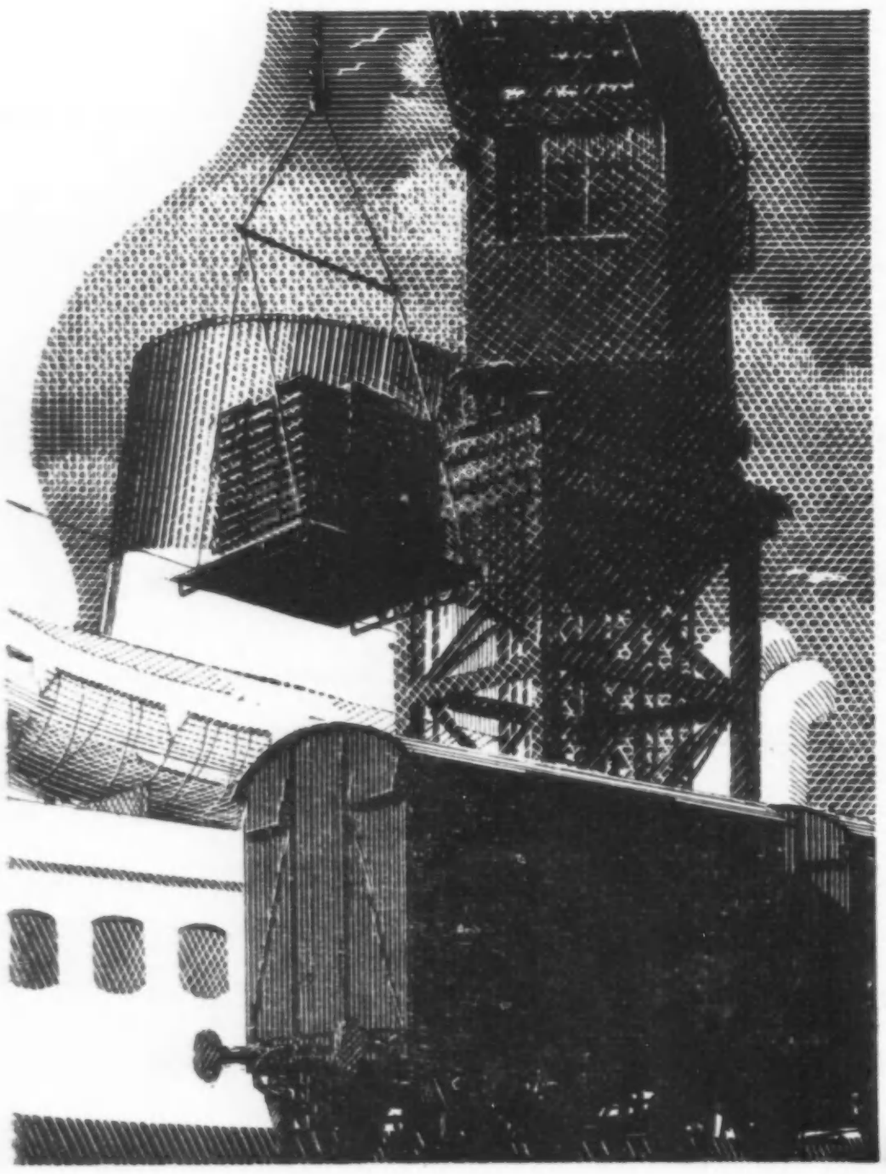

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Exhibitions and Fairs

20 Japanese stores to stage promotion of British goods

TWENTY OF THE LEADING department stores in Tokyo have been invited to hold sales promotions of British goods on the occasion of the British Exhibition which will be held in Tokyo from September 17—October 3, 1965. The organizers of the exhibition and co-ordinators of all the supporting events are British Overseas Fairs Limited, of 22, Tothill Street, London, S.W.1, who have established an office in Tokyo. The exhibition and the store promotions have the active support of the British Government departments concerned, and both the Board of Trade in London and the Commercial Department of the British Embassy in Tokyo are keen to help in every possible way to make them a success. As part of the preparations for these events, it has been suggested that it might be useful to make some of the outstanding facts about the Tokyo department stores better known to manufacturers in Great Britain whose goods may be on sale already or who might find an opening there as a result of the special interest which the stores are now taking in British goods.

The scale on which department stores operate in Japan is best illustrated by a few figures. Their sales account for nearly 12 per cent of all retail sales in this country of a hundred million customers. The Japanese Ministry of International Trade and Industry reckoned the total number of stores in this country as a whole in 1955 to be 158 and their total sales in that year to be £212 million. By 1963, the number of stores had risen to 272 and their sales to £793 million. Of the total sales in 1963, roughly £550 million were in the six largest cities of Japan, and roughly £240 million in other cities. The annual rate of increase in department store sales has been somewhere about 15 per cent in recent years. If the sales in any given month are as little as 10 per cent better than those in the same month of the previous year, everyone looks very gloomy indeed. This virtually never happens, however, and the increasing importance of the department stores in the retail trade as a whole, together with the increasing prosperity of the ordinary Japanese people, have been two of the most remarkable features of the astonishing progress which the Japanese economy has made in recent years.

There are a great many goods of British manufacture already on sale in the department stores of Tokyo, and, through them, elsewhere in Japan. Some details of what these goods are have been sent to the Export Services Branch of the Board of Trade, where the position could be discussed in some detail. What the recent survey revealed most clearly was that there are still considerable opportunities for increasing the sales of British goods in Japanese department stores, and that we have tended to concentrate on a small number of prestige items, of which high quality woollen and worsted textiles and Scotch whisky are the outstanding examples. So far comparatively little attempt has been made to treat the Japanese market as a mass market in which the taste for foreign goods over a very wide range is growing every year, together with the means to satisfy it, particularly as a result of the progressive liberalization of imports into Japan over the last few years. Some of the stores in Tokyo which are keenest on this year's sales promotions have already mentioned lines in which they would like to look at new British products and some details of their requirements are already available in the Export Services Branch of the Board of Trade or at the offices of British Overseas Fairs Limited. You only have to walk into some of the stores to see at once where opportunities lie—and our competitors are selling—for example in giftware, costume jewellery or domestic furniture; and in some of the stores there is hardly a counter where the British representation could not be improved.

The character of the Tokyo stores varies a good deal, as anywhere else. Some of them, like Wako, are obviously aiming at the top end of the market only, though the bigger ones cater for most of the scale. Some of them owe their character to specialization in earlier days, for example, at Maruzen (by far the largest importer of foreign books) no less than 50 per cent of total sales are of Japanese and foreign books and periodicals, while another 30 per cent are of stationery and business machines. This is quite exceptional. A more representative breakdown would be that of Takashimaya whose percentage of sales for 1963 by commodity was as follows: outerwear of Western style (most of it made in Japan) 17 per cent; hosiery and accessories, luggage, cosmetics, toilet articles, etc., 18 per cent; Japanese style clothing, linen, etc., 14 per cent; sporting goods, toys, stationery, jewellery, watches, cameras, etc., 7 per cent; household appliances 6 per cent; furnishings 11 per cent; foodstuffs 12 per cent; arts and antiques 1 per cent; mail order sales 5 per cent; services (photo studio, restaurant, hairdresser, etc.) 2 per cent; and direct export business 2 per cent. Other stores, notably Meidiya, put a greater accent on foodstuffs and drink.

One of the largest, Mitsukoshi, might be said to have made a special reputation for seasonal gifts of every despription. Then again, some of the stores are closely associated with their places of origin, Daimaru and Hankyu coming from Osaka and Matzuzakaya from Nagoya, for example. Yet others owe something of their flavour to their establishment at strategic points in the network of communications which serves the vast commuting population of Tokyo.

Over 1½ million commuters are said to come every day into Shinjuku Station and many of them must shop regularly at Isetan. Seibu has a similar position on top of Ikebukuro Station. But the sheer number of visitors to the Tokyo stores is something which has to be seen to be believed. Takashimaya have stated that 70,000 is the average number of customers for whom each of their stores (in Tokyo, Osaka, Kyoto and Yokohama) is catering daily. One store has claimed no less than 200,000 visitors in a single day at a time when it was running an exhibition of particular interest.

The extent of their exhibition space and the way in which they use it is another feature of the Tokyo department stores which is unusual. The majority of them have a whole floor or most of a floor in a city block available for special shows of one kind or another, very often of a cultural nature, and many of these, with the assistance of British Overseas Fairs Limited, will be using part of this space to draw attention to some feature of British life or industry more or less closely connected with some of the British products which they will have on sale next autumn.

The Tokyo department stores have done and are doing so well that they can afford to be choosy. At the same time they are extremely price conscious, apart from those few which concentrate exclusively on the top end of the market, and even these do their costing meticulously. It is not always easy to sell to these stores even when the product and its price are right, partly because many of them are unwilling to hold large stocks themselves. The majority of them buy through wholesalers, importers or agents, but they are also interested in most cases in the possibility of direct purchase for certain types of goods. Further difficulties arise from the fact that the Japanese Government have yet to liberalize imports completely and there are still restrictions on some types of product, for example biscuits and confectionery, which are of interest to many British manufacturers. Advice on how to approach the department stores and on Japanese regulations can always be obtained either from the Board of Trade or from British Overseas Fairs Limited. In addition, there are many merchant firms, both British and Japanese, who are keenly interested in trade between the two countries. Some of the Tokyo department stores will be sending buyers to Great Britain in the near future to make further preparations for this year's events, but the British manufacturer who is really keen to exploit these events, and the Japanese market, to the full is always best advised to come for a first-hand look, if he possibly can, at his target, after establishing by preliminary inquiry that there is no obvious reason why he should not have prospects here. The number of British business visitors to Tokyo has shown a welcome increase in recent years, but many of these who come out here are interested primarily or exclusively in some aspect of the Japanese market for capital goods. A much closer first-hand acquaintance between British consumer goods manufacturers and the Tokyo department stores would be the best possible preliminary to the complete success of this year's events here. Given the distance and the time which it takes for large consignments of goods to move from the British factory to the Japanese sales counter, there are not too many weeks left. Whether or not his products are already in the department stores, the British manufacturer will want to consider showing them in the following British Exhibition.

Following is a list of stores:

Daimaru Department Store, 1, 1-chome, Marunouchi, Chiyoda-ku, Tokyo; Matsuzakaya (Department Store) Co. Ltd., 1, 6-chome, Ginza, Chuo-ku, Tokyo; Toyoko Co. Ltd., 55, 2-chome, Kamidori, Shibuya-ku, Tokyo; Takashimaya Co. Ltd., 5, Tori 2-chome, Nihombashi, Chuo-ku, Tokyo; Meidiya Co. Ltd., 4, Kyobashi 2-chome, Chuo-ku, Tokyo; Seibu Department Store Ltd., 18, 2-chome, Ikebukuro-Higashi, Toshima-ku, Tokyo; Komatsu Department Store, 2, 6-chome, Ginza, Chuo-ku, Tokyo; Mitsukoshi Ltd., 7, 1-chome, Muro-machi, Nihombashi, Chuo-ku, Tokyo; Isetan Company Limited, 8, 3-chome, Shinjuku, Shinjuku-ku, Tokyo; Matsuya Co. Ltd., 1-5, 3-chome, Ginza, Chuo-ku, Tokyo; Keio Department Store, 71, Tsunohazu 2-chome, Shinjuku-ku, Tokyo; Tobu Department Store, 1179, Ikebukuro 2-chome, Toshima-ku, Tokyo; Marubutsu Department Store, 104, Higashi 1-chome, Ikebukuro, Toshima-ku, Tokyo; Sogo Stores Limited, 13, 1-chome, Yuraku-cho, Chiyoda-ku, Tokyo; Wako Co. Ltd., 2, Ginza 4-chome, Chuo-ku, Tokyo; Hankyu Department Store Inc., 2, 5-chome, Ginza Nishi, Chuo-ku, Tokyo; San-Ai Co. Ltd. Nishi 5-3, Ginza, Chuo-ku, Tokyo; Maruzen Co. Ltd. 6, 2-chome, Nihombashi, Tori, Chuo-ku, Tokyo.

(*Continued on page* 179)

LONDON INTERNATIONAL ENGINEERING EXHIBITION and the INTERNATIONAL WELDING EXHIBITION

The London International Engineering Exhibition, the largest international display of engineering equipment and techniques ever assembled in the United Kingdom, provides buyers with the opportunity of examining and comparing products and equipment from over a thousand exhibitors.

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The Internal Combustion Engine Section will comprise exhibits of engines and components by international manufacturers for marine, locomotive, industrial and agricultural applications ranging from 1½ to 20,000 b.h.p.

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CHANGES IN TRADE FAIRS AND EXHIBITIONS ANNOUNCEMENTS

BECAUSE *of pressure on space all the various classified lists of trade fairs and exhibitions will be published in full only on the dates indicated below:*

	Date last published	Date next published
Outside Europe ...	*Jan.* 1	*April* 2
Europe	*Dec.* 4	*Mar.* 5
United Kingdom ...	*Nov.* 6	*Feb.* 5

Amendments and additions to the three lists will be shown in the issues of the intervening weeks.

No responsibility is taken for the standing of organizations or individuals mentioned in the lists, and dates, etc., may be subject to alteration.

The Board of Trade Export Promotion and Fairs Branch, Queen Anne's Mansions, Queen Anne's Gate, S.W.1. (Tel. Abbey 7877, Ext. 3557, Germany and Scandinavia: 2783. France, Italy, Benelux, Switzerland, Austria, Finland, Greece, Turkey and Middle East: 3558, United Kingdom and Rest of the World) will be glad to answer general inquiries, but applications should be made to the organizers or United Kingdom agents for details of costs and conditions of participation. Export Promotion and Fairs Branch can also provide information about other events which, owing to space limitation, are not included in the lists.

** indicates event which is held annually at approximately the time stated.*

† indicates event which is held alternate years at approximately the time stated.

EUROPE

Amendments:

Bari: The Board of Trade have been informed that the International Levant Fair will be held from September 7-20, 1965, and not from September 10-23, 1965, as shown in the *Board of Trade Journal* dated December 25, 1964.

Brussels: The next International Agricultural Week will be held from February 13-20, 1966, and not from February 23-20, 1966, as shown in the *Board of Trade Journal* dated December 4, 1964.

Additions:

GOTHENBURG: SWEDISH FOOTWEAR EXHIBITION – March 9-11, 1965.

* Apply, Federation of Swedish Import Agents (S.I.A.F.) and Federation of Swedish Leather and Shoe Manufacturers Svenska Massan, Gothenburg.

DUSSELDORF: FOOTWEAR EXHIBITION – April 24-26, 1965.

* Apply, John E. Buck (Trade Fair Agencies) Ltd., 47 Brewer Street, Piccadilly, London, W.1. (Tel. Gerrard 7576).

MILAN: INTERNATIONAL MARKET FOR CLOTHING TEXTILES (MITAM) – June 4-9, 1965.

* Apply, Murray Watson Ltd., 58 Brook Street, London, W.1. (Tel. Grosvenor 3508).

BESANCON: INTERNATIONAL HOROLOGICAL EXHIBITION – September 4-13, 1965.

* Apply, Salon International de l'Horlogerie, 54 Grande-Rue Besancon.

COLOGNE: INTERNATIONAL HOUSEHOLD GOODS AND HARDWARE TRADE FAIR – September 10-12, 1965.

* Apply, Du Mont Publicity Co. Ltd., 18 Queensberry Place, London, S.W.7. (Tel. Kensington 1700).

GOTHENBURG: INTERNATIONAL FISHERY TRADE FAIR – October 29-November 7, 1965.

* Apply, Finextra Ltd., 213/4 Piccadilly, London, W.1. (Tel Regent 3944/5).

BRUSSELS: INTERNATIONAL EXHIBITION OF HOSPITAL AND MEDICAL EQUIPMENT – November 6-15, 1965.

† Apply, Salon International de l'Equipment Medical et Hospitalier, 171 Avenue du Domaine, Brussels, 19.

DUSSELDORF: INTERPACK INTERNATIONAL PACKAGING MACHINES AND MATERIALS EXHIBITION – May 12-18, 1966.

John Buck (Trade Fair Agencies) Ltd., 47 Brewer Street, London, W.1. (Tel. Gerrard 7576).

MUNICH: ELECTRONICA – INTERNATIONAL EXHIBITION OF MEASURING INSTRUMENTS AND ELECTRONIC COMPONENTS – October 20-26, 1966.

Apply, Exhibition Consultants Ltd., 11 Manchester Square, London, W.1. (Tel. Hunter 1951).

British Week in Amsterdam

Far reaching plans are taking shape to make the Week the Anglo-Dutch event of the year. From May 15 to 22 Amsterdam's shops and stores will be stocked with consumer goods from this country, London buses will ply the streets, there will be an English pub, fashion shows, an exhibition prepared by the City of London, a show house furnished and equipped with British products, concerts and theatrical performances.

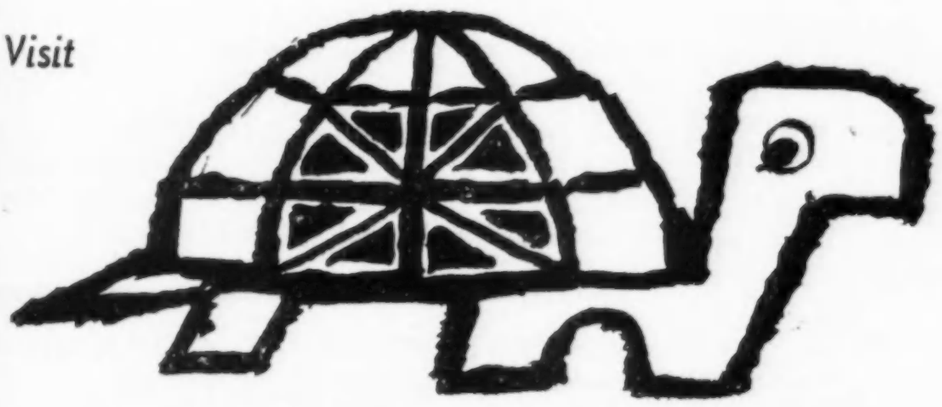
So far, five and a half months before the start of the Week, 175 British manufacturing firms, whose products range from clothing and fabrics to foodstuffs and drinks, toys and sports goods have announced that they will be taking part. Fifteen industries are co-operating to make the Week a sales success in the Netherlands market. On the Dutch side retail firms in Amsterdam have promised wide support.

Two of Holland's leading dailies, *Het Parool* and *De Telegraaf*, will be publishing special supplements advertising British goods during the Week.

This will be the third new style British Week organised by the Export Council for Europe in co-operation with the Board of Trade and follows those staged with outstanding success

(Continued on next page)

Visit



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HMSO

Government publications can be purchased over the counter or by post from the Government Bookshops in London, Edinburgh, Cardiff, Belfast, Manchester, Birmingham and Bristol, or through any bookseller

Export Tours

Businessmen going overseas are reminded that the services of British commercial officers in posts throughout the world are freely available to them. A list of addresses is published on pages i-vi of the Board of Trade Journal ***of November 6. Businessmen wishing to avail themselves of this assistance should consult in advance either the regional offices of the Board of Trade (see page 904 of October 23 issue) or the Export Services Branch, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757).***

Big export drive for prefabricated buildings

Mr Denis Howard, who recently joined G. H. Burgess and Co. Limited, the JEL Group company which handles export sales, has gone to Beirut to head a big drive to obtain more overseas orders for prefabricated buildings. Mr. Howard, who was previously export director for Cosely Buildings of Wolverhampton, and has had thirty years' experience in the building industry, much of it in the Middle East, the Caribbean and South America, will make frequent trips to the major trading centres in Middle East and North Africa.

Paint men visit Spain and East Africa

Mr. J. S. Rayner, overseas department manager for the paint manufacturers, Blundell, Spence & Co. Ltd., London, is to visit Spain and East Africa during January. He will investigate the opportunities for expanding Blundell's business and will be accompanied in Spain by the company's industrial division technical manager, Mr. W. H. Tatton. From Spain, Mr. Rayner will fly to East Africa for an extended tour of Kenya, Uganda and Tanzania in connection with Blundell's local manufacturing and marketing arrangements.

The Turkish Tobacco Monopoly are shortly due to take delivery of a four-colour rotogravure machine designed and manufactured by the Thrissell Engineering Company of Bristol. The machine seen here being shipped from Tilbury is to be used in the production of 'flip-top' packets for 'Gelinick' and 'Yenice', two new brands of cigarette for the Turkish market.

North American and Pacific tour

Mr. W. Hood Martin, senior engineer of Houseman and Thompson Ltd., water treatment engineers, leaves Glasgow on January 25 for an extensive tour of North America and the Pacific. Before he returns in mid-May he will have visited agents and clients in Canada and the United States, Japan, Hong Kong, The Philippines, Malaysia, Australia and New Zealand. The object of Mr. Martin's visits is to act as a consultant to agents and new clients and to keep them abreast of the latest product developments and processes marketed by Houseman and Thompson Ltd. In particular, he will introduce to the Pacific territories a new combustion control process developed by the company which will be made available to both the North American and Pacific areas.

Designer's trip to Brussels

Mr. James Pilditch, chairman of Allied Industrial Designers Ltd., London, W.1, has recently returned from Brussels, where he has been discussing package design and product design work his company is handling for local clients.

Central and South American sales trip

Mr. H. E. Rothschild, assistant export manager of Colibri (Export) Ltd., London, W.1, is undertaking a business trip to Central and South America and the Caribbean to investigate the potential market in these areas, to visit the company's agents and to make contacts where Colibri are not represented. Colibri Ltd., are manufacturers of high quality cigarette lighters – petrol and gas – and other smoker's requisites.

British Firm's Burmese contract

In the caption to the picture in the *Board of Trade Journal* of January 8, page 73, the word 'Butmere' should have read 'Burmese.'

EXHIBITIONS AND FAIRS *continued*

British Week in Amsterdam, *continued*

in Dusseldorf last May and Denmark last September. The fourth in the series will be held in Milan in October 1965.

The Council of Industrial Design is to arrange an exhibition of well-designed British consumer goods during the British Week in Amsterdam this year. This follows the success of the CoID's participation in the Copenhagen and Dusseldorf British Weeks held earlier last year, when altogether more than 100,000 visitors saw the two exhibitions. Like the earlier exhibitions the Amsterdam display will include examples of the best of modern British design in fabrics, cutlery, furniture, sports goods, pottery, sanitary ware and kitchen equipment. Deryck Clarke, of the CoID's exhibitions staff, is designing the exhibition, which is being organized in co-operation with the Central Office of Information on behalf of the Board of Trade.

The exhibition will open on May 14 (the day before the official opening of the British Week) and will continue until June 21, although the British Week itself ends on May 23.

Opportunity to show British goods in Dieppe

Facilities have recently been announced for British goods to be shown at the first Sussex/Normandy Fair and Festival to be held in Dieppe from July 10 to 18 and for French products to be exhibited in Brighton in 1966.

The Dieppe Fair will feature commercial and industrial exhibits from Normandy and Sussex, but there will also be stands for manufacturers of foodstuffs and textiles from other parts of France. British firms from outside Sussex who manufacture foodstuffs or textiles and who wish to show will be admitted though the main emphasis in these 'Channel Fairs' will be on Sussex firms and organizations.

Firms requiring further information about these events should contact Mrs. N. Potter, Federation of Sussex Industries, Seven Dials Corner, Brighton 1, Sussex. (Tel. Brighton 26189.)

Scottish Materials Handling Exhibition

The Scottish Materials Handling Exhibition – the first of its kind in Scotland – at the Kelvin Hall, Glasgow from May 11 to 18, will feature 100 exhibits presenting the latest ideas in lifting, fetching and carrying equipment. In addition to providing a shop window for manufacturers and buyers of such equipment, the exhibition will demonstrate that modern handling methods can be economically harnessed, even to old manufacturing techniques in old buildings.

Sponsors of the exhibition are the Institute of Materials Handling. In parallel with the exhibition the organizers have arranged a series of lectures covering various industries, in conjunction with which there will be visits to representative works in the area.

Inquiries concerning the exhibition should be addressed to The Organizer, Scottish Materials Handling Exhibition, 65/66 Turnmill Street, London, E.C.1. (Tel. Clerkenwell 8201.)

HOW OVERSEAS PRESS CORRESPONDENTS CAN HELP EXPORTERS

COPIES *of the Board of Trade booklet "Overseas Press Correspondents in London: How they and Industry can help each other" are available free of charge from Board of Trade, Information Division, Queen Anne's Mansions, Queen Anne's Gate, London, S.W.1.—or telephone Abbey* 7877, *Ext.* 2768.

The booklet explains how trade associations and individual firms, if assisted by the right material and facilities, can gain valuable publicity by disseminating information which is both of interest to their audience and of value to British exporters. Many suggestions are made on how to set about it, and there is a full list of the names and addresses of overseas press representatives in and around London.

Nufloor
NUFLOOR LTD. BASILDON ESSEX—Telephone Basildon 20201
COMMANDO/BANTAM/EDGER . . . please write for details
SANDERS-PLANERS-FINISHES

Overseas Trade and Exports

TRADE AND FINANCIAL ARRANGEMENTS

Anglo-Hungarian trade

Pending trade negotiations for 1965/66, which will be held in Budapest shortly, representatives of Britain and Hungary have agreed, as an interim measure, that the current trade arrangements should be extended for three months from January 27, 1965.

France and the USSR

THE FRENCH *Moniteur Officiel du Commerce International*, of November 4, 1964, announced that a trade agreement was signed in Paris on October 30, 1964, establishing quotas for trade between the USSR and France for the years 1965-1969 inclusive. An additional protocol to the agreement sets out supplementary quotas for the year 1965.

The new agreement sets out quotas fixing the exchange of trade between the two countries for each of the years 1965-1969. The main French exports to the USSR will be machinery and equipment, essential oils, dyestuffs and intermediate products, optical quartz, medicines and medical equipment, synthetic fibres and yarns. Soviet exports to France will include machinery and equipment, canned fish products and caviare, furs, essential oils, petroleum and petroleum products, non-ferrous metals and chemicals.

The full French text of the agreement may be seen at the Export Services Branch, Board of Trade, Room E.13, Hillgate House, 35 Old Bailey, London, E.C.4.

France and Albania

THE FRENCH *Moniteur Officiel du Commerce International* of December 5, 1964, reported that a trade agreement between France and Albania was signed in Paris on November 26, for the exchange of goods during the calendar year 1965.

The list of goods to be exchanged includes French exports to Albania of edible and industrial oils and fats, chemical and pharmaceutical products, leather, hides and skins, various types of paper and paper board, synthetic fibres, fabrics, steel cable, electrical equipment and motor cars. In return, Albania will export to France, *inter alia*, leaf tobacco, chrome, iron and nickel ore, bitumen, raw hides and skins, raw cotton and wool, not carded nor combed.

The full French text of the above agreement may be seen at the Export Services Branch, Board of Trade, Room E13, Hillgate House, 35 Old Bailey, London, E.C.4.

Italy and Tunisia

THE ITALIAN Minister of Foreign Trade has announced that the trade agreement of November 23, 1961, between Italy and Tunisia has been tacitly extended for a further year from January 1, 1965. The lists of goods to be exchanged remain the same as for 1964.

The Italian text of the quota lists can be seen at Export Services Branch (Tariff Section), Board of Trade, Room E11, Hillgate House, 35 Old Bailey, London, E.C.4, to whom inquiries concerning the notice should be made, quoting CRE 7425G.

Czechoslovakia and Albania

THE CZECHOSLOVAKIAN press has reported that an agreement on the exchange of goods and payments in 1965 between Czechoslovakia and Albania was signed in Prague on December 30, 1964. Albania will provide ferro-nickel ores, asphalt, tobacco and wine, etc. Czechoslovakia's exports will include machinery and equipment, lorries, chemical goods, paper and textiles.

Czechoslovakia and Bulgaria

THE CZECHOSLOVAKIAN press has reported that a protocol on the exchange of goods and payments in 1965 between Czechoslovakia and Bulgaria was signed in Prague on December 18, 1964.

The protocol provides for a 12 per cent increase in the volume of goods exchanged in 1965 as against 1964. Bulgaria will sell machinery, tobacco, fruit, chemicals and consumer goods, etc. Czechoslovakia will provide machinery, paper, cellulose, chemicals and consumer goods, etc.

A supplementary agreement on co-operation in the exploitation of copper ore deposits in Bulgaria was signed at the same time.

No further details are available.

Czechoslovakia and United Arab Republic (Egypt)

THE BRITISH EMBASSY in Prague reports that a protocol on the long term trade agreement adjusting the exchange of goods between Czechoslovakia and the UAR in 1965 was signed in Prague on December 18, 1964. It is expected that the volume of goods exchanged will be 10 per cent greater in 1965 than in 1964.

The UAR will supply mainly cotton, rice, manganese ore, phosphates, agricultural and other products. Czechoslovakia's exports will include machinery and engineering installations, and metallurgical and other industrial products.

Czechoslovakia and Italy

THE BRITISH EMBASSY in Prague reports that a protocol on the exchange of goods between Czechoslovakia and Italy in 1965 was signed in Prague on December 22, 1964. The protocol forms part of the long term trade agreement between the two countries for 1962/1965. It provides for a 5 per cent increase in the volume of goods exchanged.

Czechoslovakia will supply Italy with chemicals, glass, ceramics, timber and other commodities. Italy's exports will include synthetic fibres, chemicals and machinery.

Rumania and Yugoslavia

THE BRITISH EMBASSY in Bucharest has reported that a Trade Protocol for 1965 between Rumania and Yugoslavia was signed in Bucharest on December 24, 1964. The Protocol envisages an important increase in the range of trade between the two countries over 1964.

Rumania will provide Yugoslavia with petroleum products, salt, cement, machinery, tyres, window glass and various consumer goods, etc. The list of Yugoslavia exports to Rumania includes cables, rolled products, refractory materials, machinery, accumulators, insulators and various consumer goods.

China and United Arab Republic (Egypt)

IT HAS BEEN reported recently in the Chinese and Egyptian press that two agreements have been signed in Peking.

The first covers bilateral trade between these countries for the next three years. The target for total annual trade is set at £E30 million per annum.

Under the terms of the second agreement China will supply Egypt with industrial plant and equipment valued at up to $80 million between 1965 and 1968. Repayment will be made in equal instalments over ten years commencing in 1972.

Inquiries relating to this notice should be addressed to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1, (Tel. Abbey 7877, Ext. 2226) quoting reference CRE 1027G.

Information for exporters

Brief details are given below of overseas inquiries for British products, contracts open for tender, reports on commercial conditions abroad, export trade openings, etc., issued recently by the Export Services Branch, Board of Trade, to subscribers to the 'Export Service Bulletin'.

The Bulletin, published daily, is available to manufacturers and exporters at a subscription of £10 10s. a year. A subscription form can be obtained from the Export Services Branch, Board of Trade, Room H35, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757, Ext. 433) (Telex 25977). Copies of particular issues containing further details of the items referred to below can be obtained from the same address by forwarding cash remittance of 2s. per copy with order.

Calls for tender

Inquiries connected with the calls for tender mentioned below should be addressed to the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757, Ext. 404 and 406). Please quote reference numbers in all inquiries. The date given is the closing date, and refers to the current year unless otherwise indicated.

*Tender documents are available on loan in those cases marked with an asterisk.**

Part of a recent consignment of 11,000-volt cable completed by Aberdare Cables Ltd for one of their many overseas customers. The drums have been assembled for transport from the Company's factory at Aberdare, Glamorgan. Aberdare Cables exports millions of yards of cabling every year, to all parts of the world.

ARGENTINA

Road Construction for Direccion National de Vialidad. February 15. E.S.B. 903/65.

BELGIUM

The Belgian Authorities:

NATO Infrastructure Contracts: Repairs to Airfield Runways. Apply by February 8 and March 1. G.D. 1075/62(44).

Internal Protection of Aircraft Fuel Storage Tanks. Apply by February 15. G.D. 877/62(43).

CEYLON

Roller Drier for Milk Board. February 24. E.S.B. 957/65.*

Construction of Distribution Line and Sub-Stations for the Anuradhapura Preservation Board. (Further Information.) Tender documents now available. E.S.B. 37942/64.*

Water Tubes for Government Stores Department. March 22. E.S.B. 777/65.

Cable for Ministry of Land, Irrigation and Power. February 23. E.S.B. 778/65.*

Water Supply Scheme for Department of Water Supply and Drainage, Ratmalana. March 5. E.S.B. 776/65.

Garden Tractors and Accessories for Ministry of Agriculture, Food and Fisheries. February 25. E.S.B. 774/65.*

Gal Oya Development Board:

Machinery and Equipment. March 9. E.S.B. 960/65.*

Concrete Pipe Spinning Plant. February 9. E.S.B. 959/65.*

COLOMBIA

Construction of a Bridge for Ministry of Public Works. (Further Information.) Closing date postponed to April 29. E.S.B. 28813/64.

COSTA RICA

Steel Sheets for Instituto Costarricense de Electricidad. February 11. Tender documents (in Spanish) available. E.S.B. 1155/65.*

FINLAND

Road Construction for Finnish National Board of Public Roads and Waterways. (Prequalification Information.) Apply by February 10. E.S.B. 1328/65.

FRANCE

Metal Book Cases for Headquarters Command, SHAPE. February 8. E.S.B. 1310/65.*

GREECE

Pharmaceuticals and Chemicals for Institute of Social Insurance. February 4. E.S.B. 944/65.*

ICELAND

Pipe Joints for Reykjavik Purchasing Centre. February 17. E.S.B. 1302/65.*

INDIA

Switchgear for Delhi Electric Supply Undertaking. February 27. E.S.B. 1163/65.

Switchgear for U.P. State Electricity Board. March 1. E.S.B. 1164/65.

Swarf Crusher for India Supply Mission. February 15. E.S.B. 1109/65.

Metering Equipment; Oil Circuit Breakers for Madhya Pradesh Electricity Board. February 5. E.S.B. 969/65.

Transmission Line Materials for Punjab State Electricity Board. (Further Information.) Tender documents now available. E.S.B. 37983/64.*

Wire Rewinding Machine for Hindustan Cables Ltd. February 15. E.S.B. 37674/64.*

Switchgear for Rajasthan State Electricity Board. (Further Information.) Closing date postponed to February 8. E.S.B. 21147/64.*

Crane for Obra Dam Construction Circle. (Further Information.) Closing date postponed to February 20. E.S.B. 28377/64.*

Silicon Iron for Indian Telephone Industries Ltd. (Further Information.) Tender documents now available. E.S.B. 38190/64.*

Hindustan Aeronautics Ltd.:

Micrometers. February 4. E.S.B. 705/65.

Hand Tools. February 3. E.S.B. 704/65.

Madras State Electricity Board:

Tunnel Construction. March 5. E.S.B. 787/65.

Pump Sets. February 3. E.S.B. 782/65.*

Indian Railways:

Pneumatic Hoist Blocks and Controls. (Further Information.) Tender documents now available. E.S.B. 35257/64.*

Steel Billets. February 22. E.S.B. 904/65.*

Steel Channel. February 25. E.S.B. 905/65.*

Railway Equipment. (Further Information.) Closing date postponed to February 8. E.S.B. 25570/64.

Andhra Pradesh State Electricity Board:

Concrete Mixers. February 3. E.S.B. 792/65.

Sand-making Plant. February 6. E.S.B. 793/65.

Sand-making Plant. February 8. E.S.B. 795/65.

Pump Sets. February 8. E.S.B. 794/65.

Atomic Energy Establishment, Trombay:

Distribution Switchboard. February 8. E.S.B. 1116/65.*

Drilling Machine. February 8. E.S.B. 1117/65.

Electric Collator. February 15. E.S.B. 1119/65.

Precision Lathe. February 5. E.S.B. 1121/65.

Transistors. February 17. E.S.B. 1124/65.

Electrical Equipment. February 16. E.S.B. 1123/65.

Air Monitor. February 15. E.S.B. 1122/65.

Transistors. February 18. E.S.B. 1125/65.

Winding Machine. February 5. E.S.B. 1137/65.*

Chittaranjan Locomotive Works:

Lathe. February 22. E.S.B. 947/65.*

Armature Banding Machine. February 22. E.S.B. 949/65.*

Cutting Machine. February 22. E.S.B. 950/65.*

Alternator Set. February 22. E.S.B. 953/65.*

Lathe. February 22. E.S.B. 946/65.*

Testing Equipment. February 22. E.S.B. 952/65.*

Motor Testing Plant. February 22. E.S.B. 951/65.*

Electric Oven. (Further Information.) Tender documents now available. E.S.B. 36780/64.*

Annealing Furnace. (Further Information.) Tender documents now available. E.S.B. 36779/64.*

Lathe. February 22. E.S.B. 946/65.*

Vertical Boring Machines. February 3. E.S.B. 1181/65.

Testing Sets; Wire Cutting Machines; Coil Binding Machines. March 1. E.S.B. 1179/65.

Kerala State Electricity Board:

Wagon Drill. (Further Information.) Tender documents now available. E.S.B. 762/65.*

Tractors. February 9. E.S.B. 789/65.*

Directorate of Supplies and Disposals:

Vehicle Spares. February 5. E.S.B. 1162/65.*

Woodworking Machines. February 26. E.S.B. 1171/65.*

Machine Tools. February 20. E.S.B. 975/65.*

Joint Rings. February 9. E.S.B. 779/65.*

Tractors. February 26. E.S.B. 1170/65.*

Machine Tool. February 12. E.S.B. 1110/65.*

Tin Ingot. February 9. E.S.B. 1161/65.*

Slotting Machine. February 12. E.S.B. 966/65.*

Aerial Ropeway. February 4. E.S.B. 965/65.*

Machine Tool. February 10. E.S.B. 37810/64.*

Machine Tool. February 3. E.S.B. 928/65.

Hindustan Shipyards Ltd.:

Heavy Duty Lathe. (Further Information.) Tender documents now available. E.S.B. 37102/64.*

Mobile Cranes. (Further Information.) Tender documents now available. E.S.B. 37101/64.*

Marine Equipment. (Further Information.) Tender documents now available. E.S.B. 37000/64.*

Marine Equipment. (Further Information.) Tender documents now available. E.S.B. 36999/64.*

Beas Purchase Organization:

Pipe and Bolt Threading Machine. (Further Information.) Tender documents now available. E.S.B. 37385/64.*

Lever Chain Hoists. February 24. E.S.B. 1165/65.

Oxygen Cylinders. March 10. E.S.B. 1167/65.

Steam Cleaning Unit. April 15. E.S.B. 1166/65.

Cutting Machine. (Further Information.) Tender documents now available. E.S.B. 37384/64.*

IRAN

Telephone Equipment for Iran Telephone Company. February 17. E.S.B. 941/65.*

Laundry Equipment for Foreign Transactions Co. February 19. E.S.B. 1111/65.*

Iranian State Railways:

Dumpers. March 18. E.S.B. 970/65.

Fishplates and Fittings. March 14. E.S.B. 998/65.

Tricycles; Saw Blades. March 16. E.S.B. 997/65.

IRAQ

Civil Engineering Work for Ministry of Agrarian Reform. March 21. E.S.B. 988/65.

Paint; Fire Extinguishers for Administration of Distribution of Oil Products. February 17. E.S.B. 987/65.
Syringes for General Drugs and Chemicals Imports and Distribution Co. February 28. E.S.B. 984/65.
Ministry of Education:
Globes. March 28. E.S.B. 985/65.
Plastics Working Machinery. March 28. E.S.B. 983/65.
Ministry of Municipal and Rural Affairs:
Water Supply Scheme. March 30. E.S.B. 986/65.
Electrical Sets. March 30. E.S.B. 989/65.
Tanks. February 16. E.S.B. 1491/65.
Ministry of Defence:
Air Coolers. February 17. E.S.B. 902/65.*
Electric Lamp. February 24. E.S.B. 990/65.
Grinding Machine. February 14. E.S.B. 38335/64.*
Nails Making Machine. February 14. E.S.B. 38336/64.*

IRISH REPUBLIC

Bridge Construction for Kerry County Council. (Advance information.) Closing date not known. E.S.B. 1301/65.
Chlorination Plant for Cork County Council. February 26. E.S.B. 1138/65.

MALAYSIA

Fork Lift Trucks for Port of Singapore Authority. March 31. E.S.B. 915/65.*
Pipe Fittings for Public Utilities Board. February 16. E.S.B. 1148/65.*
Government Electrical Department:
Crane. February 8. E.S.B. 907/65.
Low Loader. February 8. E.S.B. 908/65.

MOZAMBIQUE

Constructional Projects for Ports, Railways and Transport Department. February 16. E.S.B. 939/65.

NEW ZEALAND

Cable for Auckland Electric Power Board. March 12. E.S.B. 1178/65.*
Transformers for New Zealand Electricity Board. March 30. E.S.B. 1308/65.*

PAKISTAN

Railway Carriages for East Pakistan Railway Board. (Further Information.) Tender documents now available. E.S.B. 723/65.*
Scraper for Government of East Pakistan. February 6. E.S.B. 973/65.*
Pakistan Telegraph and Telephone Department:
Coaxial Cable. February 25. E.S.B. 1139/65.
Microwave Spurs. February 25. E.S.B. 1140/65.
East Pakistan Industrial Development Corporation:
Fertilizer Factory. (Further Information.) Closing date postponed to March 15. E.S.B. 28246/64.
Paper Plant. (Further Information.) Tender documents now available. E.S.B. 38142/64.*
Directorate of Supply:
Heating Elements. February 15. E.S.B. 995/65.*
Intercom Equipment. February 10. E.S.B. 1105/65.*
Printing Machinery. February 15. E.S.B. 996/65.*
Electric Light Fixtures. February 8. E.S.B. 1175/65.*
Road Rollers. February 10. E.S.B. 974/65.*
V.I. Wire. Switches. February 15. E.S.B. 1174/65.*

PARAGUAY

Road Construction Vehicles/Equipment for Ministerio de Obras Publicas. (Further Information.) E.S.B. 25341/64.*

PHILIPPINE REPUBLIC

Electrical Equipment for National Power Corporation. February 16. E.S.B. 1309/65.*

SAUDI ARABIA

Road Construction for Ministry of Communications. March 17. E.S.B. 21604/64.

SOUTH AFRICA

South African Railways:
Railway Signalling Equipment. February 3. E.S.B. 1311/65.*
Steam Generators; Tanks. February 12. E.S.B. 1146/65.*
State Tender Board:
Battery Chargers. February 3. E.S.B. 1197/65.*
Carbontetrachloride. February 8. E.S.B. 1127/65.*
Test Pumps; Trailers. February 4. E.S.B. 1142/65.*
Dump Trucks. February 4. E.S.B. 1135/65.*
Cranes. February 4. E.S.B. 1141/65.*
Transformers. February 4. E.S.B. 1144/65.*
Surgical Equipment and Chemicals. February 4. E.S.B. 1133/65.*

SPAIN

Ministry of Works:
Constructional Project. February 5. E.S.B. 930/65.
(1) Floating Crane; (2) Port Dredging Work; (3) Reconstruction of Railway Track. (1) February 3; (2) February 12; (3) February 6. E.S.B. 1147/65.

SUDAN

Controller of Stores, Sudan Railways:
Drilling Machine. February 25. E.S.B. 914/65.*
Lathe. (Further Information.) E.S.B. 38365/64.*
Lathes. March 2. E.S.B. 1177/65.*
Lubricating Oil. February 16. E.S.B. 912/65.*
Marking-out Table. February 24. E.S.B. 1176/65.*
Pump. February 18. E.S.B. 913/65.*

TANZANIA

Soap for Central Tender Board. February 12. E.S.B. 906/65.*

THAILAND

Cable for Telephone Organization. February 11. E.S.B. 1185/65.
VHF Omnidirectional Range for Department of Aviation. February 5. E.S.B. 1186/65.*

URUGUAY

Miscellaneous Items for State Oil Refinery. Closing dates various up to March 23. E.S.B. 937/65.
Paints for State Railways of Uruguay. March 24. E.S.B. 935/65.
State Electricity Board:
Transmission Line. (Further Information.) Closing date postponed to March 9. E.S.B. 30351/64.
Wire. February 26. E.S.B. 933/65.

Agency and export opportunities, market surveys, etc.

Further details of the items referred to below can be obtained from the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4 (City 5757, Ext. 427). Please quote reference numbers in all inquiries.

Algeria
Inquiry for electric oven; paints. (E.S.B. 1568/65.)

Australia
Development projects. (E.S.B. 434/65.)

Austria
Agency inquiry for cakes; confectionery. (E.S.B. 1271/65.)
Agency inquiry for dresses. (E.S.B. 1278/65.)
Agency inquiry for confectionery items. (E.S.B. 1275/65.)
Agency inquiry for foodstuffs. (E.S.B. 1272/65.)
Inquiry for pumping units. (E.S.B. 1059/65.)

Bahamas
Agency inquiry for furniture; furnishings; glass; wallpaper. (E.S.B. 38257/64.)
Inquiry for hotel furniture and equipment – further information. (E.S.B. 31972/64.)
Inquiry for furniture; mattresses. (E.S.B. 38258/64.)

Bolivia
Agency inquiry for mining and petroleum equipment. (E.S.B. 1509/65.)
Inquiry for lamps. (E.S.B. 444/65.)
Inquiry for fertilizers. (E.S.B. 38502/64.)

British Guiana
Agency inquiry for footwear. (E.S.B. 466/65.)

Canada
Inquiry for knitwear. (E.S.B. 1008/65.)
Inquiry for film; negatives. (E.S.B. 38099/64.)
Inquiry for glass battery jars. (E.S.B. 892/65.)
Inquiry for cocoa. (E.S.B. 38530/64.)

Canary Islands
Inquiry for valves; asbestos pipe. (E.S.B. 38437/64.)

Costa Rica
Inquiry for hardware; tools. (E.S.B. 32325/64.)

Egypt
Inquiry for machinery and plant. (E.S.B. 38057/64.)

Ethiopia
Inquiry for building materials and equipment; postal equipment. (E.S.B. 435/65.)
Inquiry for footwear; coats. (E.S.B. 615/65.)

Fiji
Agency inquiry for building materials. (E.S.B. 1444/65.)

Finland
Agency inquiry for compressors. (E.S.B. 675/65.)

France
Agency inquiry for building materials; domestic electrical appliances; radio and T.V. sets and accessories. (E.S.B. 38409/64.)
Inquiry for candles; scourers. (E.S.B. 482/65.)
Inquiry for wrapping and packing materials. (E.S.B. 1021/65.)
Market report on Rennes and the Department of Ille-et-Vilaine. (E.S.B. 426/65.)

France/USSR
Trade Agreement. (C.R.E. 10120/2/G.)

Germany, Federal Republic of
Agency inquiry for welding equipment. (E.S.B. 821/65.)
Inquiry for technical glass bowls. (E.S.B. 33743/64.)
Inquiry for knitting wool. (E.S.B. 1076/65.)
Inquiry for office furniture, equipment and supplies. (E.S.B. 481/65.)
Inquiry for radio frequency parts. (E.S.B. 1842/65.)
Inquiry for boiler tubes. (E.S.B. 690/65.)

Hong Kong
Agency inquiry for slide fasteners. (E.S.B. 1023/65.)

Iran
Inquiry in respect of building and road construction. (E.S.B. 37877/64.)

Israel
Agency inquiry for textile machinery. (E.S.B. 619/65.)
Agency inquiry for processing equipment. (E.S.B. 814/65.)
Agency inquiry for machinery. (E.S.B. 1050/65.)
Inquiry for automotive spare parts and accessories; petrol engines. (E.S.B. 1029/65.)
Manufacture under licence – feed additives. (E.S.B. 1082/65.)

Italy/Morocco
Trade Agreement. (C.R.E. 3941/G.)

Jamaica
Inquiry for spices. (E.S.B. 653/65.)
Inquiry for furniture hardware; abrasive papers. (E.S.B. 21786/64.)

Lebanon
Inquiry for refrigerated vans. (E.S.B. 1235/65.)

Malaysia
Agency inquiry for foodstuffs. (E.S.B. 32372/64.)
Inquiry for hotel equipment, furniture and fittings. E.S.B. 1630/65.)
Collaboration – motor accessories; rubber products. (E.S.B. 38055/64.)

Mozambique
Inquiry for hardware machinery. (E.S.B. 475/65; E.S.B. 474/65.)

Norway
Agency inquiry for giftware; toys. (E.S.B. 1479/65.)
Agency inquiry for clothing. (E.S.B. 1013/65.)
Agency inquiry for yarn. (E.S.B. 441/65.)
Agency inquiry for hospital equipment. (E.S.B. 1098/65.)

Philippines
Inquiry for copper wire rod. (E.S.B. 652/65.)

Portugal
Inquiry for motor accessories and spare parts. (E.S.B. 468/65.)
Inquiry for textile machinery. (E.S.B. 1072/65.)
Inquiry in respect of factory for the manufacture of lenses. (E.S.B. 660/65.)
Inquiry for textile machinery. (E.S.B. 1297/65.)
Inquiry for textile machinery. (E.S.B. 1047/65.)

Saudi Arabia
Agency inquiry for pharmaceutical products. (E.S.B. 700/65.)
Inquiry for nails and rivets. (E.S.B. 37790/64.)

South Africa
Abattoir and allied facilities. (E.S.B. 36105/64.)

Sudan
Inquiry for building materials; electrical equipment and appliances; film equipment; paints and compounds; printing machinery and allied materials; sanitary-ware. (E.S.B. 16001/64.)
Inquiry for industrial machinery. (E.S.B. 1415/65.)
Inquiry for building and construction machinery and equipment. (E.S.B. 695/65.)

Sweden
Inquiry for textiles. (E.S.B. 1571/65.)

Switzerland
Agency inquiry for transfers. (E.S.B. 1613/65.)
Agency inquiry for domestic electric appliances; tool kits. (E.S.B. 1012/65.)
Agency inquiry for lamps; toys. (E.S.B. 614/65.)
Agency inquiry for glass curtain walling materials. (E.S.B. 839/65.)
Agency inquiry for compressors. (E.S.B. 499/65.)
Agency inquiry for jointings, packings and seatings; products for gas and water supplying industries; plastics materials. (E.S.B. 380/65.)
Inquiry for electric motors. (E.S.B. 37888/64.)

Syria
Agency inquiry for chemicals; fabrics; hides and skins; paper and cardboard; tinplate. (E.S.B. 877/65.)

Trinidad
Inquiry for refuse collecting vehicles. (E.S.B. 2780/64.)

Turkey
Inquiry for insulating material. (E.S.B. 853/65.)

Turkey/Iran
Trade Agreement. (C.R.E. 11576/G.)

United States of America
Agency inquiry for electronics equipment. (E.S.B. 447/65.)
Inquiry for lanterns. (E.S.B. 37752/64.)
Inquiry for surgical appliances. (E.S.B. 38461/64.)
Inquiry for compressors. (E.S.B. 34168/64.)
Inquiry for department store consumer goods. (E.S.B. 38489/64.)
Inquiry for blades; cutlery. (E.S.B. 38298/64.)
Inquiry for measuring tapes. (E.S.B. 662/65.)
Inquiry for hotel/restaurant equipment. (E.S.B. 1248/65.)
Manufacture under licence in Britain – cups. (E.S.B. 35738/64.)
Visits of buyers. (E.S.B. 1887/64.)
British store promotion at Carson, Pirie, Scott and Company, Chicago. (E.S.B. 38515/64.)
British store promotion at Thalhimer Brothers Inc., Richmond, Virginia. (E.S.B. 37549/64.)

Tariff, Customs and Import Regulations in overseas countries

REGISTERED TRADE MARK (RTM) GOODS IN OVERSEAS TARIFF LISTS

The Lists of Tariff, Customs and import regulation changes in overseas countries published in this section of the Journal sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view.

Items which fall into this category will now be preceded by the letters 'r t m'. Readers of the Journal should note that this prefix signifies that the words are registered as trade marks in the United Kingdom, but that in the present context they are assumed to refer generally to products of the description stated in brackets.

While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.

EUROPEAN ECONOMIC COMMUNITY

Changes to Common Customs Tariff

THE *Journal Officiel des Communautés Européennes* of December 31, 1964 contains the text of a decision taken by the Council of the EEC modifying the Common Customs Tariff to take account of changes made to the Brussels Nomenclature. The supplement to the *Board of Trade Journal* of November 13, 1964 which gives the effect of these changes on the UK Tariff covers, generally, the items which have been amended in the Common Customs Tariff of the EEC.

The above *Journal Officiel* also contains a decision modifying the Common Customs Tariff in respect of tariff items 13.03, 74.06, 76.01 and 76.05.

The French text of these decisions may be seen on application to the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4, (Tel. City 5757, Ext. 479).

Suspension of Common Customs Tariff

THE *Journal Officiel des Communautés Européennes* of December 24, 1964 contains the text of a decision taken by the Council of the EEC concerning the total and partial suspension of the Common Customs Tariff during 1965. The majority of the items included in the decision were similarly treated in 1964 but in a number of cases the duty after partial suspension is at a higher rate than in 1964.

The list appended below shows all items subject to suspension of duties during 1965, including those for which suspension of duties were included in earlier decisions. Duties reduced as a result of agreements with third countries are not included. (For details see *Board of Trade Journal* of February 1, 1963, October 11, 1963 and July 3, 1964).

Tariff Heading	Description of Goods	Common Tariff Rate of Duty for 1965
ex 08.01 D	Cashew nuts	2·5%
09.02	Tea:	
	A. Put up for retail sale in packages of net weights of 3 kilos or less	5%
	B. Other	Total suspension
09.03	Mate	Total suspension
ex 09.04 A II (c)	Pimento of the genus Capsicum, not crushed or ground, other	10%
ex 09.04 B	Pimento of the genus Capsicum, crushed or ground	12%
ex 09.08 A II	Cardamoms, not crushed or ground, other	Total suspension
ex 09.08 B	Cardamoms, crushed or ground	Total suspension
ex 09.09 A III (b)	Coriander seeds, not crushed or ground, other	Total suspension
ex 09.09 B II	Coriander seeds, crushed or ground	Total suspension
09.10 D I (b)	Ginger in the form of whole roots, pieces or slices, other	Total suspension
09.10 D II	Ginger imported in other forms	Total suspension
ex 09.10 E II	Curry powder and paste	Total suspension
13.02 A II	Shellac, seed lac, stick lac and other lacs, bleached	Total suspension
15.07 B 1 (a) 2	Castor oil, intended for other uses	7%
ex 15.07 B I (b) 1	Tobacco seed oil, crude	Total suspension
ex 15.07 B I (b) 2	Tobacco seed oil, other	Total suspension
ex 20.01	Mango chutney	Total suspension
ex 20.04	Ginger preserved by sugar	Total suspension
ex 20.06 B II (a)	Ginger, prepared or preserved, not containing added spirit, but containing added sugar, in immediate packings of a net capacity of more than 1 kg.	Total suspension
ex 20.06 B II (b)	Ginger, prepared or preserved, not containing added spirit but containing added sugar, in immediate packings of a net capacity of 1 kg. or less	Total suspension
ex 21.04	Liquid mango chutney	Total suspension
ex 27.07 G	Aromatic products for the manufacture of carbon blacks	Total suspension
27.10	Petroleum and shale oils, other than crude, preparations not elsewhere specified or included containing not less than 70% by weight of petroleum or shale oils, these oils being the basic constituents of the preparations:	
	A. Light oils:	
	I. Destined to undergo a 'defined process'	Total suspension (a)
	II. Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.10 A I	Total suspension (a)
	III. Destined for other uses:	
	a Special spirit:	
	1. White spirit	6%
	2. Other	6%
	b Not specified	6%
	B. Medium oils:	
	I. Destined to undergo a 'defined process'	Total suspension (a)
	II. Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.10 B I	Total suspension (a)
	III. Destined for other uses:	
	a Kerosene	6%
	b Not specified	6%
	C. Heavy oils:	
	I. Gas oil:	
	a Destined to under a 'defined process'	Total suspension (a)
	b Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.10 C I a	Total suspension (a)
	c Destined for other uses	3·5%
	II. Fuel oils:	
	a Destined to undergo a 'defined process'	Total suspension (a)
	b Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.10 C II a	Total suspension (a)
	c Destined for other uses	3·5%
	III. Lubricating and other oils:	
	a Destined to undergo a 'defined process'	Total suspension (a)
	b Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.10 C III a	Total suspension (a)
	c Destined to undergo a process other than those defined to the sub-headings Nos. 27.10 C III a and b	4% (a)
	d Destined for other uses	7%
27.11	Petroleum gases and other gaseous hydrocarbons:	
	A. Commercial propane and butane:	
	I. Destined to undergo a 'defined process'	Total suspension (a)
	II. Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.11 A I	Total suspension (a)
	B. Other:	
	I. In the gaseous state	Total suspension
27.12	Petroleum jelly:	
	A. Crude:	
	I. Destined to undergo a 'defined process'	Total suspension (a)
	II. Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.12 A I	Total suspension (a)
27.13	Paraffin wax, micro-crystalline wax, slack wax, ozokerite, lignite wax, peat wax and other mineral wax, whether or not coloured:	
	B. Other:	
	I. Crude:	
	a Destined to undergo a 'defined process'	Total suspension (a)
	b Destined to undergo chemical transformation by a process other than those defined for sub-heading No. 27.13 B 1 a	Total suspension (a)

Tariff Heading	Description of Goods	Common Tariff Rate of Duty for 1965
ex 27.14 C	Extracts obtained by the treatment of lubricating oils with selective solvents for the manufacture of carbon blacks	Total suspension
ex 28.30 A VII	Titanous chloride	Total suspension
ex 28.52 B	Rare earth metal chlorides	4%
* 28.55 B	Iron phosphides (ferro-phosphorus) containing 15% or more by weight of phosphorus	Total suspension (a)
ex 29.01 C I	Pinenes	6%
ex 29.01 C I	Camphene	6%
29.01 D VI	Vinyltoluene	6%
* 29.02 B	Halogenated derivatives of cyclanic, cyclenic and cycloterpenic hydrocarbons	Total suspension
ex 29.13 D I	3β-Hydroxpregn-5-en-20-one	3%
ex 29.13 D I	3β:17α-Dihydroxypregn-5-en-20-one	3%
ex 29.13 D I	11β:21-Dihydroxypregna-1:4:17(20)-trien-3-one	6%
ex 29.13 D I	11β:21-Dihydroxypregna-4:17(20)-dien-3-one	6%
ex 29.13 D I	3β-Hydroxyandrost-5-en-17-one	3%
29.13 F	1:4-Naphthaquinone	6%
ex 29.14 A II (c) 5	16:17-Epoxy-3β-hydroxypregn-5-en-20-one acetate	3%
ex 29.14. A II (c) 5	17α:21-Dihydroxy-16α-methylpregna-1:4:9 (11)-triene-3:20-dione-21-acetate	6%
ex 29.14 A II (c) 5	11α:17α:21-Trihydroxy-16α-methyl-5α-pregnane-3:20-dione 21-acetate 11 toluene-p-sulphonobe	6%
* 29.15 A IV a	Sebacic acid	3%
*ex 29.15 B	1*H*:2*H*-Hexachloro-3:6-*endo*methylenecyclohex-4-ene-1:2-dicarboxylic anhydride	8%
*ex29.16 D	Endothal and endothal-Na	8%
*ex 29.25 A 3	Methacrylamide	Total suspension until 30.6.65
ex 29.29	3β-Hydroxypregna-5:16-dien-20-one acetate oxime	3%
*ex29.29	*asym*Dimethylhydrazine	9%
*ex 29.29	Ethylhydrazide of podophyllinic acid	6%
ex 29.31 B	Thiodi (di*sec*amyl phenol)	6%
ex 29.35 S	2-Chloro-4:6-di(*iso*propylamino)*sym*triazine	8%
ex 29.35 S	*OO*-Diethyl *O*-4-methyl-2-*iso*propylpyrimid-6-yl phosphorothioate	8%
ex 29.35 S	Paraquat dichloride	8%
ex 29.35 S	2-Chloro-4:6-di(ethylamino) *sym*triazine	8%
ex 29.35 S	2-Chloro-4-ethylamino-6-*iso*propylamino-*sym*triazine	8%
ex 29.35 S	Diquat dibromide and dichloride	8%
ex 29.35 S	Diosgenin	Total suspension
ex 29.35 S	1:4-Diazabicyclo[2:2:2] octane	Total suspension
ex 29.38 B I	Vitamin B6 and its derivatives	4%
29.41 A	Digitalins	6%
ex 29.41 D	Pure squill glucoside	6%
ex 29.41 D	Calcium salt of sennosides A & B	6%
*ex 29.41 D	Benzylidenepodophyllotoxin-β-D-glucoside	6%
ex 29.42 C VIII	Alkaloids of ergot of rye, their salts, ethers, esters and other derivatives	6%
38.07	Spirits of turpentine (gum, wood and sulphate) and other terpenic solvents produced by the distillation or other treatment of coniferous woods; crude dipentene; sulphite terpentine; pine oil (excluding 'pine oils' not rich in terpinol): B. Other than gum spirits of terpentine	3%
ex 38.08 C	Hydroabietyl alcohol, technical	Total suspension
ex 38.11 C	Pyrethrum extract in mineral oil solution	5%
ex 38.19 Q	Mixtures of aldehydes obtained from lignin	Total suspension
ex 38.19 Q	Mixed tertiary mercaptans	Total suspension
ex 38.19 Q	Crude guanine (paste derived from fish scales and other fish waste, containing mineral oil, of a type used in the manufacture of pearl essence)	Total suspension
ex 39.01 B VIII	Polyoxymethylene resins in use in one of the forms mentioned in Note 3 (a) and (b) to Chapter 39	4%
ex 39.02 C III	Polysulphohaloethylenes in one of the forms mentioned in Note 3 (a) to Chapter 39	4%
ex 39.02 C VIII	Vinyl chloride-vinylidene chloride copolymers containing at least 80% by weight of vinylidene chloride, in one of the forms mentioned in Note 3 (a) and (b) to Chapter 39 destined for the manufacture of fibres, monofil or strip	4% (a)
ex 39.02 C XIV (a)	Vinylidene fluoride-hexafluoropropene copolymers in one of the forms mentioned in Note 3 (a) and (b) to Chapter 39	4%
39.03 B V (a) 1	Ethylcellulose (unplasticized)	4%
ex 39.03 B V (a) 2	Ethylhydroxyethylcellulose	4%
ex 39.07	Articles of materials of the kinds described in headings Nos. 39.01 to 39.06: A. Of regenerated cellulose: Regenerated cellulose strip of an actual width exceeding 5 mm. slightly twisted and then compressed and not flattened	10% Until 31.12.66
40.02 C	Products reinforced by the incorporation of plastic materials	5%
44.03	Wood in the rough, whether or not stripped of its bark or merely roughed down: A. Tropical woods of the species listed in the complementary note to this Chapter	Total suspension
44.04	Wood, roughly squared or half squared, but not further manufactured: A. Tropical woods of the species listed in the complementary note to this Chapter	Total suspension
44.05	Wood sawn lengthwise, sliced or peeled, but not further prepared, of a thickness exceeding 5 mm.: A. Tropical woods of the species listed in the complementary note to this Chapter	Total suspension
ex 44.28 B	Shingles for roofing or facing purposes, of coniferous wood	Total suspension
ex 48.01	Paper and paper board (including cellulose wadding), machine made, in rolls or sheets:	
	E. Other: II. Not specified: Japanese paper (special long fibre paper)	Total suspension Until 30.6.65
51.01	Yarns of man-made fibres (continuous), not put up for retail sale: ex B. Yarns of fibres described in Note 1 (b) to this Chapter: Hollow filament yarn of man-made fibres	Total suspension
62.03	Sacks and bags of a kind used for the packing of goods: B. Of woven fabrics of other textile materials: I. Used: (b) Other than of woven fabrics of flax or sisal	15%
70.19 A I a	Glass beads, cut and polished mechanically	Total suspension
70.19 A III a	Imitation precious and semi-precious stones, cut and polished mechanically	Total suspension
* 81.04 M	Uranium depleted in uranium-235	Total suspension
*ex 97.06	Equipment for cricket and polo	Total suspension

NOTES:
(a) Classification under this heading is subject to conditions to be determined by the competent authorities.
Items marked with an asterisk are subject to suspension for the first time.

Further translations of EEC Regulations

THE following further translations of EEC Regulations are now available from HM Stationery Office, Kingsway, London, W.C.2, and branches. To obtain copies of these Regulations by post, orders and remittances, including postage, should be addressed to HM Stationery Office, PO Box 568, Cornwall House, London, S.W.1.

Regulation No.	Description	Price
78/64	Supplementing Regulations Nos. 50/64 and 51/64	5d.
83/64	On procedures to avoid deflection of trade in rice and brokens	5d.
111/64	Grouping milk and dairy products	9d.
113/64	Relating to certain measures by way of derogation and concerning powdered milk, butter, condensed milk and certain cheeses	6d.
114/64	On implementing procedure concerning countervailing duty and the granting of subventions in accordance with Article 10 of Regulation No. 13/64	9d.
120/64	To amend and extend the validity of certain measures relating to refunds to starch producers	6d.
121/64	Concerning the system to be applied to rice and broken rice originating in the Associated African and Malagasy States and in the overseas countries and territories	6d.
122/64	Amending certain provisions of the Commission's Regulation No. 73/64	6d.
123/64	Instituting certain transitional provisions in respect of the levy applicable to broken rice	3d.
124/64	Adjusting and fixing sluice-gate prices for pigs and pigmeat products in respect of imports effected between October 1 and December 31, 1964	6d.
133/64	Determining the additional amount of the levy on farmyard poultry eggs in shell	6d.

THE NETHERLANDS

Import duty tariff quotas

A NETHERLANDS Ministerial Order No. D4/9866 of December 24, 1964 (*Nederlandse Staatscourant* No. 251 of December 24), contains a *consolidated* list of goods (reproduced below) to be admitted free or at a reduced rate of import duty up to an annual quota specified against each item when imported from **non-EEC** countries.

Goods imported under the terms of this Order may **not** be re-exported from The Netherlands before they have undergone some form of further manufacture or treatment. (Cleaning, sifting, washing, dyeing, bottling, packing in bags, affixing labels, etc., will not be regarded as having been further manufactured or treated.)

The Order came into force from January 1, 1965

(1) Tariff No.	(2) Description of Goods	(3) Annual Quota (Quantity: Metric tons)		(4) Duty-free or Reduced Duty (Per cent)	
		OLD (Prior to Jan. 1, 1965)	NEW (From Jan. 1, 1965)	OLD (Prior to Jan. 1, 1965)	NEW (From Jan. 1, 1965)
08.02 A I a 08.02 A II a	Seville oranges	150	160	3 (Jan. 1, 1964-Mar. 31, 1964);	3 (Jan. 1, 1965-Mar. 31, 1965);

(*Continued on next page*)

NETHERLANDS, *continued*

Tariff No.	Description of Goods	Annual Quota (Quantity: Metric Tons)		Duty-free or Reduced Duty (Per cent)	
		OLD (Prior to Jan. 1, 1965)	NEW (From Jan. 1, 1965)	OLD (Prior to Jan. 1, 1965)	NEW (From Jan. 1, 1965)
				2·3 (April 1, 1964-Oct. 15, 1964); 3 (Oct. 16, 1964-Dec. 31, 1964)	2·3 (April 1, 1965-Oct. 15, 1965); 3 (Oct. 16, 1965-Dec. 31, 1965)
08.04 B I	Grapes, dried, in packages of a net weight of not more than 15 kg. . . .	1,016*	570	6	2·4
ex 38.08 C III	Hydrogenated, polymerized and dimerized rosins . .	2,200	1,850	1·2	1·2
45.02 B	Natural cork in blocks, plates, sheets or strips (including cubes or square slabs, cut to size for corks or stoppers), not reinforced with paper, fabric or other materials .	12	15	1·8	1·8
73.02 A II	Ferro-manganese (containing 2% or less by weight of carbon) . .	200	100	Free	Free
73.02 C	Ferro-silicon . .	4,000	3,500	Free	Free
73.02 D	Ferro - silico - manganese . .	450	400	Free	Free
73.02 E I	Ferro-chromium .	400	200	Free	Free
73.02 G I	Ferro-tungsten .	4	4	Free	Free
ex 73.02 H	Ferro-molybdenum .	22	18	Free	Free
ex 73.02 H	Ferro-vanadium .	7	4	Free	Free
73.05 A	Iron and steel powders	1,500	1,500	2	2
ex 73.13 B IV e 2	Sheets and plates, of iron or steel, clad with nickel, 'monel' metal or stainless steel . . .	122·5‡	140	6	6
ex 73.15 B IV b 1	Wire rod of stainless steel . . .	262·5‡	300	6	6
ex 73.15 B IV b 2	Bars and rods of stainless steel .				
ex 73.15 B IV b 2	Bars and rods of alloy tool steel, namely steel, other than high speed steel, containing either: At least 0·60% by weight of carbon; Less than 0·04% by weight of sulphur or phosphorus, each of these elements taken separately; Less than 0·07% by weight of sulphur and phosphorus taken together; Not more than 2% by weight of manganese; Not more than 1% by weight of silicon; Less than 12% by weight of chromium; Not more than 10% by weight of wolfram; Not more than 1% by weight of vanadium; Not more than 5% by weight of nickel; Not more than 1% by weight of molybdenum; Not more than 2% by weight of cobalt; or: Not more than 13% by weight of chromium, but more than 1% by weight of carbon.	175‡	100	6	6
ex 73.15 B IV b 1	Wire rod of high speed steel . .	65·625‡	75	6	6
ex 73.15 B IV b 2	Bars and rods of high speed steel . .				
73.13 A I and 73.15 B VI a 1	'Electrical' sheets and plates with a watt-loss regardless of thickness of 0·75 watt or less .	400*	400†	3	3

‡ Quota for the period from February 15, 1964, to December 31, 1964.
* Quota for the second half of 1964. † Quota for the first half of 1965.

A previous notice on The Netherlands Import Duty Tariff Quotas was published in the *Board of Trade Journal* on January 15, 1965, page 142.

IRISH REPUBLIC

Licences for imports of raw onions

LICENCES UNDER the Irish Republic's Onions (Regulations of Import) Order, 1948, will no longer be required for the import of raw onions (whether fresh or dried) during the period February 3 to May 15, 1965.

Licences under the Colorado Beetle Order, 1945, and the Foot and Mouth Disease (Importation of Plants) Order, 1952, will, however, be required in respect of each consignment.

CANADA

'Made in Canada' ruling

THE FOLLOWING RULINGS have been made for Canadian Customs purposes:

Of 'a class or kind made in Canada':

Self-levelling dispensers as used in hotels, restaurants and cafeterias for dispensing dishes, trays, glasses, etc.

Bulk unloaders designed for truck or trailer mounting and used in handling light materials such as grains and feeds.

(Rulings effective February 18, 1965.)

The above information is contained in Canadian Department of National Revenue Memoranda Series D51-13-1 and D51-21-1, dated January 18, 1965.

MEXICO

Importation and local manufacture of constructional equipment

A NOTICE published in the *Board of Trade Journal* on May 15, 1964 (pages 1090/1), reported the introduction of a Mexican Decree making obligatory the local manufacture of machinery and equipment used in the construction industry.

A further Decree, published in the *Diario Oficial* on December 2, 1964, establishes the procedure to be followed for the importation and the local manufacture of diesel engines as well as machinery and equipment for the construction industry which are not yet being manufactured in Mexico.

Under the new Decree import licences will only be granted for diesel engines not manufactured or authorized by the Mexican authorities as well as for the importation of machinery and equipment for the construction industry different from those the manufacture of which has already been approved, together with components for their assembly, to firms which within a period of 45 calendar days of the date of publication of the Decree (i.e. January 16, 1965) have notified the Mexican authorities of their readiness to be manufacturing such engines, machinery or equipment within a period of not more than two years from the date of publication of the Decree (i.e. December 1, 1966) with a minimal national content of 60 per cent of the direct cost of manufacture and with at least 10 per cent of this content from their own plants. These percentages will be calculated for each machine, item of equipment or engine separately in the manner prescribed in the Law for the Encouragement of New and Necessary Industries.

Firms which indicate their intention to fulfil the requirements must submit to the authorities within a period of not more than 90 calendar days from the date of publication of the Decree (i.e. March 1, 1965), their manufacturing programmes. The authorities will grant approval to suitable programmes submitted within a period not greater than 30 calendar days (i.e. March 31, 1965) after the 90 days mentioned above. In granting approval they will take into account the economic feasibility of the programmes submitted and will authorize only a sufficient number of projects to cover the national market, bearing in mind the interests of manufactures already established and of those who have previously had approved their programmes for the manufacture of diesel engines, machinery and equipment for the construction industry.

Programmes which are submitted and subsequently authorized must be guaranteed by a bond of Mex$500,000. This will be forfeit and import licences suspended in respect of firms which

fail to comply with their approved programme or with the terms of the Decree.

For a programme to be approved it is mandatory that at all times Mexicans with permanent residence in Mexico hold at least 51 per cent of the declared capital of the firm concerned. Firms receiving approval for the simultaneous production of machines for the construction industry and diesel engines used therein, may also manufacture the same equipment as that made under programmes already submitted and approved, but only for the export market or to cover satisfactorily the supply to the national market as may be decided by the authorities. The Decree *excludes specifically* manufacturers of motor cars and motor trucks and their affiliates or subsidiaries unless previously authorized.

Those firms which have their programmes approved and which export the diesel engines and machinery covered by the Decree, as well as components manufactured locally, which incorporate a minimum of 60 per cent of the direct cost of manufacture, including 10 per cent in their own plants, will have preference in the granting of import licences in respect of those machines and diesel engines of special specification which are not being manufactured locally.

Once the two-year period mentioned in paragraph 3 above has expired, and after due consideration, the Mexican authorities will advise which firms will be allowed to manufacture the equipment covered by the Decree and cancel the guarantee bonds.

A translation into English of the Decree may be seen at Tariff Section, Export Services Branch, Board of Trade, Room E46, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757, Ext. 474 or 476).

ARGENTINA

'Index prices'

HM EMBASSY at Buenos Aires report the issue of Decree No. 9766 of December 2, 1964. This Decree lays down that in respect of imported merchandise whose purchase price is higher than the established 'index price' (i.e. 'aforo'), the liquidation of the respective charges shall be calculated on the basis of the invoice price. If, on the other hand, the invoice price is lower than the official index value, the latter will be taken as the basis for the calculation of dues.

Modifications to import lists

ARGENTINE GOVERNMENT Decree No. 9284 of November 18, 1964, modifies as follows the lists attached to Decree No. 5439/59:

Tariff No.	Item
1799/802	Presses for casein.
1480, 1799/802	Compressors and air motor compressors, portable, of up to 4½ cubic metres/minute capacity inclusive, at 7 kg. sq. cm. pressure; and air compressors attached to the motor block, autoportable, up to 3·2 cubic metres/minute capacity at 7 kg. sq. cm. pressure; excluding rotary compressors and those of low pressure, Roots-type of more than 2 cubic metres/minute capacity.
	The above two items are hereby removed from List No. 6, Section (B).
1799/802	Homogenizers for milk, double and single effect, up to 5,000 litres per hour, excluding those with oscillating and self-grinding valves, whose parts that come in contact with the liquid are of stainless steel or other sanitary material.
1799/802	Steam generating boilers characterized by the product of their maximum service in effective atmospheres multiplied by their normal continuous production in tons of steam per hour, without limit to temperature of final steam, when said product exceeds 5,000 and up to 8,000 and provided that the maximum service pressure at outlet valve of steam reheater is above 50 atmospheres and does not exceed 70 effective atmospheres.
	The above two items are hereby removed from List No. 6, Section 'A'.
1799/802 (84, 59, 11, 90 and 84, 11, 02, 05)	Presses for casein, excluding those of continuous type.
1480 – 1799/802 (84, 11, 02, 90 and 84, 11, 02, 05)	Compressors and air motor compressors, portable and autoportable, of up to 8 cubic metres effective minute capacity at 7 kg. sq. cm. pressure; excluding those of low pressure Roots-type of more than 2 cubic metres capacity.
	The above two items are hereby included in List No. 6, Section 'B'.
1799/802 (84, 01, 01)	Steam generating boilers, whose maximum service pressure in effective atmospheres, multiplied by their normal continuous production in tons of steam per hour, without limit to temperature of final steam of an index higher than 5,000 and up to 15,000 provided that the maximum service pressure at outlet valve of steam reheater is above 50 atmospheres and does not exceed 91 effective atmospheres.
	The above item is hereby included in List No. 6, Section 'A'.
1799/802 (84, 10, 90)	Water motor pumps, pumps and motor pumps.
	The following exclusion is hereby added to this item in List No. 6, Section 'B':
	'Automatic hydraulic pump, autocompression system.'

Further modifications to import lists

ARGENTINE GOVERNMENT Decree No. 7736 of October 2, 1964, adds the following items to the lists attached to Decree No. 5439/59:

Tariff No.	Item	List
4271	Liquid consisting of an acidic aqueous solution of phosphates, chlorides, and sulphates of iron, sodium and chromium, with an organic substance	5
4819	Artificial organic pigment (mixture of 50% of C.I. Pigment Green 7, C.I. No. 74,260 and 50% of an anionic dispersing agent) ('Sicosal Solid Green G')	5
4262 bis	4-Chloro-*m*-cresol	3
951/952	'Flautillas' and 'melodicas', 'Hohner' make, or the like, with keys	3
4672	Liquid with the properties of a mixture of safrole, sesquiterpenes and cresols ('Camfrol 44')	5

(*Continued on next page*)

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ARGENTINA, *continued*

Imports of capital goods

HM EMBASSY at Buenos Aires report the issue of Argentine Central Bank Circular R.C. No. 196 of November 20, 1964, which establishes the following regime of payments in respect of imports of capital goods:

(a) Goods worth up to 5,000 dollars f.o.b.: cash.
(b) Over 5,000 dollars and up to 20,000 dollars: payments to be in 4 half-yearly instalments, commencing 6 months after shipment.
(c) Over 20,000 dollars and up to 50,000 dollars: 6 half-yearly instalments commencing 12 months after shipment.
(d) Over 50,000 dollars and up to 100,000 dollars: 8 half-yearly instalments commencing 12 months after shipment.
(e) Over 100,000 dollars and up to 200,000 dollars: 10 half-yearly instalments commencing 12 months after shipment.
(f) Over 200,000 dollars and up to 500,000 dollars: 12 half-yearly instalments commencing 24 months after shipment.
(g) Over 500,000 dollars and up to 1,000,000 dollars: 14 half-yearly instalments, commencing 24 months after shipment.
(h) Over 1,000,000 dollars: subject to special arrangement, but terms not less favourable than the above.

It is understood that the term 'Capital goods' is meant to include machinery, equipment, motors, transport items, communications, production and distribution of electric energy and generally any equipment which would figure in the category of fixed assets and is used in the production of goods and the operation of services.

Imports of pedigree livestock and imports of capital goods detailed in the Argentine National List for Brazil, Colombia, Chile, Mexico, Peru and Uruguay, and in the special lists for Ecuador and Paraguay (i.e. goods to which Latin American Free Trade Association concessions apply) are exempted from the provisions of this Circular.

VENEZUELA

Documentation of Air Freight

HM EMBASSY in Caracas report that the Venezuelan Ministry of Finance have issued a circular to the Venezuelan Airlines Association about the documentation of air freight.

With effect from December 1, 1964, it says, the basic Customs document for importation of goods by air (the International cargo bill – airway bill) must be made out in *Spanish*, the goods being shown in accordance with the specification of the Customs Tariff or by the commercial name. If the commercial name is used, the nature of the goods must be described as clearly as possible with, in addition, an indication of the material or materials of which they are made and their use and application if this is not evident.

Change of official time in the Netherlands Antilles

ARISING FROM THE change of the official time in Venezuela and with effect from January 1, 1965, the three Leeward Islands of The Netherlands Antilles (Aruba, Bonaire and Curacao) have altered their official time to GMT minus 4 hours.

This brings them into line with the Windwards Islands of The Netherlands Antilles (St. Martin, Saba and St. Eustatius).

BRAZIL

Levy on imports

HM EMBASSY at Rio de Janeiro report that SUMOC Instruction No. 285 of December 24, 1964, modifies Instructions Nos. 275 and 280 (see the *Board of Trade Journal* issues of September 4, 1964, page 535, and October 23, 1964, page 918). The financial levy on imports shall henceforth be collected in the following ratios:

(a) 10 per cent on the counter-value of the exchange contract for imports of goods.
(b) 30 per cent on the counter-value of the exchange contract for financial transfers.

Compulsory deposits

Under the terms of Instructions No. 285 the percentage on the deposit incident on the counter-value of the exchange contract for imports of goods and financial transfers is now fixed at 50 per cent.

URUGUAY

Import surcharge

HM EMBASSY at Montevideo report that the goods listed under Article (5) of the Decree published in the *Board of Trade Journal* of December 11, 1964, pages 1302 and 1303, from 'gaskets and packing material' to 'spares for domestic sewing machines' inclusive, should in fact have been included under Article (3). These goods are, therefore, subject to the new surcharge of 60 per cent.

AUSTRALIA

Revision of customs by-laws

THE AUSTRALIAN Department of Customs and Excise have announced changes in the By-laws shown below:

New by-laws

The following goods will be admitted under the By-law Tariff until further notice:

Goods	Classification and Duty under the British Preferential Tariff	
	Tariff Item	Rate of Duty
SURFACE-ACTIVE AGENTS, organic, and surface-active preparations: otherwise classifiable under Tariff Item 94 (B), but not including: . . . . . ethylene oxide condensation products with alkyl phenols sulphonated oils sulphonated oils compounded with alkalis, silicates or soap for use in the textile industry for the purpose of assisting penetration and giving an even finish in the dyeing process, under security.	449 (A) (1)	Free

Amended by-laws

The following By-laws have been amended to apply to the goods as shown:

Goods	Classification and Duty under the British Preferential Tariff	
	Tariff Item	Rate of Duty
PAPER AND PAPERBOARD, otherwise classifiable under Tariff Item 335 (D) (3) or (4), viz.: Tinted pasteboards having a substance exceeding 400 grammes per square metre . .	335 (D) (1) (b)	Free

Cancelled by-laws

The following goods are removed from the provisions of By-law entry and will now be classified under the substantive item indicated:

Goods	Classification and Duty under the British Preferential Tariff	
	Tariff Item	Rate of Duty
PAPER AND PAPERBOARD, otherwise classifiable under Tariff Item 335 (D) (3) or (4), viz.: Tinted pasteboards having a substance exceeding 145 grammes per square metre . . but Tariff Item 335 (D) (1) (b) applies to such goods provided they are in direct transit to Australia on December 23, 1964, and are entered for home consumption on arrival; or in bond in Australia on December 23, 1964, and are entered for home consumption on or before January 25, 1965.	335 (D) (3) or (4)	Various

Decisions on tariff classifications

THE AUSTRALIAN Department of Customs and Excise have announced the following decisions on the application of the Australian Tariff:

Goods	Classification and Duty under the British Preferential Tariff	
	Tariff Item	Rate of Duty
WALL AND CEILING PARTS: Acoustic materials, irrespective of size: Composed of wood pulp, wood fibre or of other vegetable material (including cane fibre) reduced to a fibrous state and compressed into sheets . . . . . Composed chiefly of slag wool . . .	335 (H) (2) (b) 425 (A)	20% *ad val.* 20% *ad val.*

Tariff Board inquiry

THE AUSTRALIAN Minister for Customs and Excise has referred to the Tariff Board for inquiry and report the question whether **Phenol-Formaldehyde Moulding Powders** (Tariff Item 369(C)(1)(b)), should be gazetted under Section 7 of the Customs Tariff (Dumping and Subsidies) Act 1961.

Section 7 of this Act provides that, when it is proved that goods that are produced or manufactured outside Australia and have been or are being exported to Australia have been, are being or may be sold to a person in Australia at an export price that is less than the normal value of the goods at the date of exportation, and that the importation of those goods is causing or threatening injury to an Australian industry producing or manufacturing like or directly competitive goods or may hinder the establishment of an Australian industry in connection with the production or manufacture of like or directly competitive goods, dumping duty may be imposed of a sum which represents the difference between the *normal value* of the goods at the time of shipment and the export price.

The normal value, in relation to goods that have been or are being exported to Australia, means whichever of the following amounts, as ascertained by the Minister expressed in Australian currency, is determined by the Minister to be the normal value of those goods:

(a) an amount equal to the fair market value of like goods sold in the country of export for home consumption in the ordinary course of trade plus free-on-board charges paid or payable in that country in respect of the goods, but not including any duties or other taxes paid or payable in that country in respect of the goods, being duties or taxes that are remitted or refunded on export;

(b) an amount equal to the highest comparable price paid for like goods sold in the country of export for export to a third country in the ordinary course of trade plus free-on-board charges paid or payable in the country of export in respect of the goods, but not including any duties or other taxes paid or payable in the country of export in respect of the goods, being duties or taxes that are remitted or refunded on export;

(c) an amount equal to the fair market value of like goods produced or manufactured, and sold, in a third country selected by the Minister, being a country in which, in the opinion of the Minister, the costs of production or manufacture are similar to those in the country of export, in the ordinary course of trade for home consumption in that third country plus such amount as is estimated by the Minister to be the cost of placing the goods free-on-board in the country of export, but not including any duties or other taxes, paid or payable in the third country in respect of the goods, being duties or taxes that are remitted or refunded on export, or

(d) an amount equal to the sum of:

(i) the cost of production or manufacture of the goods or, if the Minister is of opinion that adequate information as to the cost of production or manufacture of the goods cannot be obtained, such amount as is estimated by the Minister to be the cost of production or manufacture of the goods;

(ii) free-on-board charges paid or payable in the country of export in respect of the goods; and

(iii) such additional amount in respect of selling costs and profit as is determined by the Minister.

This matter has been reported by telegraph by the British Senior Trade Commissioner at Canberra, who has been asked by the Australian authorities to notify them at the earliest possible date if any United Kingdom interests propose to tender evidence. In accordance with normal procedure, notification in this instance should be given to the Australian authorities not **later than February 10, 1965.** Before this date, therefore, United Kingdom Trade Associations or firms intending to submit evidence to the Tariff Board should so advise the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1, quoting reference No. C.R.E. 651/65.

MALAYSIA (THE STATES OF MALAYA)
Pioneer Industries Ordinance, 1958

THE BOARD OF TRADE have been informed by cable that the Government of the States of Malaya have announced that subject to representations made in writing to the Minister of Commerce and Industry before February 13, it is proposed to declare the following industries and products to be pioneer industries and pioneer products under the Pioneer Industries (Relief from Income Tax) Ordinance, 1958:

Industries	Products
(A) Manufacture of electrical industrial equipment	(A) Arc welding equipment
(B) Manufacture of miscellaneous electrical apparatus	(B) Fluorescent light ballasts

This notice means that an interested party has suggested to the Minister of Commerce and Industry that the products mentioned above should be made in the States of Malaya. Firms to which Pioneer Industries Certificates are granted will enjoy the benefit of exemption from Federal Company Tax for a period of from two to five years depending on the amount of capital investment in Malaya.

THE BOARD OF TRADE have been informed by cable that the Government of the States of Malaya has announced that the following industries and products have been declared Pioneer Industries and Pioneer Products under the Pioneer Industries (relief from Income Tax) Ordinance, 1958:

Industries	Products
(A) Manufacture of fireworks	(i) Fireworks for display purposes (ii) Fire crackers
(B) Manufacture of miscellaneous primary textiles	Woven carpets, vegetable fibres, wool, synthetic fibres
(C) Motor vehicle parts and accessories manufacture	(i) Bodywork and parts thereof (ii) Seals and gaskets (iii) Radiators and parts

The Proposal to designate these products was announced in the *Board of Trade Journal* of November 30, 1964, page 1145.

All inquiries regarding these notices should be made to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877, Ext. 2627), quoting reference CRE 1236/4G.

PORTUGUESE EAST AFRICA (MOZAMBIQUE)
Liquidation of Indian assets

HM CONSULATE-GENERAL in Lourenço Marques have reported that the impending liquidation of the following Indian businesses has been announced. Claims against their assets must be submitted by February 2, 1965.

District of Tete

Halimabai Mussa.
Herdeiros de Alimamad Omar.

Inquiries about this notice should be addressed to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877, Ext. 2340.)

British trade correspondent in the Seychelles

THE title of the British Trade Correspondent in the Seychelles has been changed. Correspondence should now be addressed to:

Registrar of Co-operative Societies
Victoria,
Mahe,
Seychelles.

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RHODESIA

Application for increase in duty

THE FIRST SECRETARY (Commercial) at Salisbury has reported that the Ministry of Trade, Industry and Development have received an application for an increase in the customs duty on engraved printing plates as follows:

	Duty A	Duty B	Duty C	Duty D
Ex item 118 (c) (iii):				
Present duty . . . *ad val.*	10%	5%	Free	Free
Proposed duty . . . *ad val.*	30%	25%	20%	20%

(Britain pays the Column D rate of duty.)

Where British trade organizations are thought to be interested in the application they are being informed, and it is suggested that any British firm desiring to make representations to the Ministry of Trade, Industry and Development and belonging to a trade organization should get in touch with that body in the first instance. Firms proposing to make independent representations to the Rhodesian authorities and desiring further information on the subject should address their inquiries to the Commercial Relations and Export Department, Board of Trade, 1 Victoria Street, London, S.W.1, quoting reference CRE 652/65. The closing date for the receipt of representations by the Rhodesian authorities is February 25.

Import control

DETAILS WERE GIVEN in the *Board of Trade Journal* of August 23, 1963 (page 436) of the changes brought about by Federal Government Notice No. 232 relating to the Control of Goods (Import) Open General Licence, 1963.

Rhodesia Government Notice No. 30, published in the Supplement to the Rhodesia Government Gazette of January 8, sets out the Control of Goods (Import) Open General Licence, 1965. This licence replaces the Control of Goods (Import) Open General Licence, 1963, the main provisions of which remain unaltered except that imports of children's clothing from Japan are now allowed without restriction.

TUNISIA

Ten per cent increase on import duties and taxes

THE TUNISIAN *Journal Officiel* of December 31, 1964, published details of a new Finance Administration Law to take effect from January 1, 1965. Chapter II of this law increases many duties and taxes by 10 per cent, the following being those primarily affected:

1 Customs import duty and customs formalities tax.
2 Consumption and production taxes.
3 Consumption tax on alcohol, soaps and perfumery.
4 Tax on explosives, tyres and inner-tubes.

Inquiries about this notice should be addressed to Export Services Branch, Board of Trade, Room E.13, Hillgate House, 35 Old Bailey, London, E.C.4.

SYRIA

Nationalization

LISTS OF FIRMS in Syria nationalized by Legislative Decrees Nos. 1 and 2 of January 2, 1965, and No. 5 of January 4, 1965, are now available.

Inquiries about this notice should be addressed to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877, Ext. 2357).

BAHRAIN

Foreign investment

THE BAHRAIN GOVERNMENT has issued an explanatory booklet entitled 'Foreign Investment in Bahrain', copies of which may be obtained from Michael Rice & Co. Ltd., 39 Park Street, London, W.1.

LEBANON

Lebanese pound

On January 1, the official parity of the Lebanese pound was changed in order to bring Lebanon nearer compliance with the International Monetary Fund rules on parities. In future, the official rate which is only used in the calculation of Customs duties, will be fixed as near as possible to the free market rate of exchange (currently £8.62 Leb.=£1 sterling).

Inquiries about this notice should be addressed to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877, Ext. 2357.)

MOROCCO

Import Restrictions

THE *Board of Trade Journal* of December 11, 1964, pages 1292 to 1294, published a list of goods the import of which into Morocco was authorized. The following additions and amendments to the list have recently been announced:

Additions:	
Human hair	05.01.00
Hazel nuts (for industrial use)	08.05.11
Animal and vegetable oils	15.08.00
Refined glycerol	15.11.11
Malt extract	19.01.00
Prepared baking powders	21.06.21
Artificial fur, in pieces or strips, for industrial use	Ex 43.04.01
Yarn of jute (for pyrotechnical uses)	Ex 57.06
Textile fabrics coated or impregnated with oil	59.09.01-02
Linoleum, not inlaid, for industrial use	59.10.01
Pitch-coated, paper-lined jute sacks, imported empty	Ex 62.03.03 to 06
Safety footwear, of leather, for professional use	Ex 64.02.02-05
Worked human hair	Ex 67.03.11
Articles for domestic purposes, sanitaryware and parts, of copper	74.18.11
Articles of copper and copper alloys, for technical uses	Ex 74.19.52
Heels and tips for shoes, of aluminium	Ex 76.16.72
Tanks	87.08
Watches (Roskopf system), for professional use	Ex 91.01.02
Appliances and apparatus for sport	97.06
Slide fasteners	98.02
Amendments: The undermentioned should be substituted for the corresponding items in the original list:	
Page 1292, 1st Column:	
Spat of oysters	.03.03.11
Cheeses (curds excluded)	Ex 04.04.00
Sorghum (seed) and other cereals	10.07.21-41
Oil seeds and oleaginous fruits	Ex 12.01.03*, 12.01.06-07-08-18-22-23
Crude oils	15.07.01-02-03-04-06-07-09-12-14-15-18-19
Cocoa and cocoa butter; cocoa powder, unsweetened, for industrial uses	18.01.00, 18.04.00, 18.05.00
Active natural yeasts for distilling and brewing (dried yeasts only)	Ex 21.06.01
2nd Column	
Natural mineral waters having therapeutic properties	Ex 22.01.11
Fertilizers	Chapter 31 (except 31.03.21-32-41-51)
Waxes, artificial and prepared: scouring pastes and glazing and preserving waxes for citrus fruits	34.04, Ex 34.05.12
Condensation, polycondensation and polyaddition products	39.01 (except 39.01.51-52)
Polymerization and copolymerization products (excluding polyvinyl chloride pipes)	39.02.01, 39.02.03 to 31, Ex 39.02.33, 39.02.41 to 95
Articles of artificial plastic materials, ethers and esters of cellulose, artificial resins (for medical or industrial uses only)	Ex 39.07
Unvulcanized rubber (gum for chewing gum only)	Ex 40.05, Ex 40.06.02
Unvulcanized rubber (excluding camelback)	Ex 40.06.01
Plates, sheets, strips of rubber (flooring in the piece and printers' blankets only)	Ex 40.08.01
Other articles of unhardened vulcanized rubber (for industrial use and rubber erasers)	Ex 40.14
Page 1293, 1st Column:	
Common woods, in the rough:	
Coniferous wood, barked	44.03.01
Pit-props	44.03.15-16-17
Other coniferous wood	44.03.06
Other common woods	44.03.07-08-11-12-13
Sawn or sliced woods (excluding peeled woods):	
Coniferous	Ex 44.05.01 to 09
Other common woods	Ex 44.05.11 to 19
Fine woods	Ex 44.05.22-29
Railway or tramway sleepers of wood	44.07.02-12
Roughly-trimmed wood	44.10.01
Wood prepared for matches	44.11.11
Wood flour	44.12.11
Casks and parts	44.22.01-11-12
Wood for brush bodies and handles	44.25.21
Papers and paperboards; articles of cellulose wadding, paper and paperboard	48.01.01 to 11, 48.01.22, Ex 48.01.23*, 48.01.71 to 48.03.21, 48.04.00, 48.05.11 to 21, 48.07.01-11, Ex 48.07.12*, 48.07.21-22-23-25, 48.07.28 to 48.10.00, 48.13, 48.15.01-11-61-71, 48.16.15, 48.18.11 to 31, 48.20, 48.21.04-05-08-09-10-11-14-15-17-18
Man-made fibres (continuous)	Chapter 51
Cotton, not carded or combed	55.01
Man-made fibres (discontinuous) (excluding fabrics of the 'drapery' type)	56.01 to 06, Ex 56.07

Twine, cordage, ropes†	59.04.01 to 04, 59.04.13-14-15-16-05-06, 59.04.07-08-10-21-22-23
Textile fabrics coated or impregnated for special purposes	59.07-08
Waxed textile fabrics (Jaconas ribbons for industrial use only)	Ex 59.09.11
Wicks	59.14
Knitted or crocheted fabric, not elastic nor rubberized	60.01.02-21-31
Corsets, corset-belts and other clothing accessories	61.09.01-11-31
Used or new rags (for industrial use only)	Ex 63.02
Apparatus and articles for technical, sanitary and hygienic purposes, domestic or toilet articles	69.09-10, 69.12.11-21-31
Safety glass, toughened, more than 180 x 110 cm.	Ex 70.08.01
Rear-view mirrors (for motor cars only)	Ex 70.09.01
Containers for the conveyance or packing of goods, stoppers, lids and other closures, of glass (for laboratory and perfumery use only)	Ex 70.10
2nd Column	
Iron, cast iron and steel	Chapter 73 (except 73.03-05, 73.94.12, 73.21-22, 73.24.11, 73.26, 73.27.11, 73.31.01, 73.38.12-13-14-15-16-17-21, 73.39, 73.40.01-11-21-22-24-31-32-34-35-36)
Wrought bars, sections and wire of copper	74.03
Cooking and heating apparatus, not electrically operated, of copper	74.17
Tools (except shovels), implements, cutlery and spoons and forks of base metal†	Ex 82.01, 82.02 to 08, 82.09 (except 82.09.01-11), 82.10, 82.11.01-21-22, 82.11.24, 82.11.25, 82.12, 82.14 (except 82.14.01-13), 82.15
Planners, paper rests	83.04.04
Apparatus with an electrical light source (for professional use only)	Ex 83.07.11
Boilers, machinery and mechanical appliances†	Chapter 84 (except 84.01.28, 84.15.02-11, 84.19.41, 84.20.11-12, Ex 84.21.11*, 84.22.01-05, 84.24.12-31-32-33-89, 84.40.21-22)
Electrical machinery and equipment for electrotechnical uses†	Chapter 85 (except Ex 85.01.23*-24*-26*, 85.03.13, 85.04.11, 85.06.01, 85.07, 85.12.21, Ex 85.12.31*, 85.12.41-42-43, 85.15.21-31-62, 85.19.71)
Motor vehicles (of less than 3,000 c.c.)†	87.02.01-11
Motor cars and other motor vehicles (touring cars for the transport of persons must be of an fob price less than 12,000 Dirhams)	87.02.12-13-14-21-31-32-51-52-53
Invalid carriages, motorized or not	87.11
Parts and accessories for cycles†	Ex 87.12.01, 87.12.11*, Ex 87.12.21*-22*
Photographic cameras and flashlight apparatus	90.07.01-03, Ex 90.07.04*, 90.07.11 to 23*
Cinematographic apparatus	90.08.01, 90.08.02*, Ex 90.08.03*, 90.08.11, 90.08.21*, Ex 90.08.22*, 90.08.31 to 43
Image projectors; photographic enlargers and reducers (for professional or educational uses only)	Ex 90.09
Page 1294:	
Apparatus and equipment for use in photographic and cinematographic laboratories; spools or reels; screens (the latter for professional or educational uses only)	90.10.01-02, Ex90.10.11, 90.10.21 to 23
Gas, liquid and electricity meters (other than water)	Ex 90.26
Brooms and brushes	96.02.01-11-41-51
Various buttons (excluding those of acrylic resin)	Ex 98.01.01
Pens (ball point only)	Ex 98.03.00
Propelling pencils (for professional uses only)	Ex 98.03.21
Spare parts and accessories for pens, pencils, etc., of base metal or non-metallic	98.03.32 to 34
Encased or sheathed pencils (except types made in Morocco)	Ex 98.05.11-12
Lighters (for industrial uses only)	Ex 98.10.11
Wine of fresh grapes, in bottles, flasks or pots of 5 litres or less ('d'appellation controlee')	Ex 22.05.01-02
Silver and silver alloys, unwrought, in lumps, ingots and pellets; native silver, bars, wire, sections, plates, sheet, strip†	71.05.01*-11*
Platinum and alloys, unwrought, in lumps, ingots and pellets; platinum sponge, platinum black; bars, wire, sections, plates, sheet and strip of platinum†	71.09.01*-02*

† In addition to articles specifically indicated in the description columns above the following are to be strictly subject to quota: 59.04.13-14-15-16-05-06, 71.05.01-11, 71.07.11, 71.09.01-02, 72.01.32, 82.11.24, 84.15.01, 84.61.43-44, 85.23.02-11-12, 87.02.11, 87.12.22, 90.01.01.

* NOTES

Add: 90.07.04, 90.07.11 to 23 } for special industrial and professional uses.

Amend the following original items to read:

48.01.23	for match sticks and electrical conductors only.
85.01.23-24-26	the exclusion applies only to equipment of a power of 0·5 kVA-5,000 kVA and a voltage less than or equal to 60,000 V.
90.08.02-03-21-22	using films equal to or more than 16 mm. only.

Inquiries about this notice should be addressed to Export Services Branch, Board of Trade, Room E.13, Hillgate House, 35 Old Bailey, London, E.C.4.

Hints to businessmen visiting Jordan

A REVISED EDITION of the booklet on Jordan has been published in the series of 'Hints to Business Men'.

British business men who intend visiting this country can obtain a copy of the booklet on application to Export Services Branch, Board of Trade, Room F56, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. City 5757, Ext. 7146), or to any Regional Office of the Board of Trade, or on personal application to the Export Information Centre, Board of Trade, 50 Ludgate Hill, London, E.C.4.

TURKEY

Global import quotas and liberalization list

THE TURKISH AUTHORITIES announced on January 4, 1965 the fourteenth list of global quotas and the liberalization list for the first half of 1965. Applications to import under the quotas must be made by Turkish importers within one month of the date of publication in Turkey.

The main changes in the quota list as compared with that published in the *Board of Trade Journal* of July 24, 1964, pages 190 to 196 are as follows:

Additions.

Customs Tariff No.	Description
38.19.20	Cyanides (for the requirements of metal chain manufacturers).
29.15	Plasticizer only.
39.02.10	Poly-vinyl alcohol.
34.02.20	Organic surface-active agents.
39.03.40	Hydroxy-ethyl cellulose and carboxi-methyl cellulose.
29.14.31	Formic acid.
40.10	'V' belts for agricultural implements and machines. (At the disposal of the Ministry of Agriculture.)
51.01.10, 51.03.10	Synthetic yarn for fish-nets (for the manufacturers of fish-nets).
51.02	Artificial materials (monofil, strip and the like) used in textile industry and knitting.
51.02	Synthetic materials (monofil, strip and the like) used in textile and knitting industry (for making brushes).
52.01	Yarns covered with metal strips and threads.
57.06.10	Jute yarn.
68.04.20, 82.02	Saw for cutting marble.
73.12	Lead coated strips of iron and steel 56·5 mm.-66 mm. wide and 0·14 mm. thickness (for Bergmann pipe manufacturers).
73.13	Pickled sheet up to 0·75 mm.
73.40.90	Temper cast steel or cast iron material for the manufacture of chain insulators.
38.13	Pickling preparations for metal surfaces.
73.19	High-pressure steel conduits.
84.10.22	Boiled water and steam pumps, step-up action and feed pumps.
84.61	Valves and other mechanism for LPG tanks and high-pressure boilers and thermostatic and pressure control valves for the same.
90.24	Instruments and apparatus for measuring, checking or automatic controlling of liquids and gases. (For manufacturing boilers under internationally certified licence and LPG tanks bigger than 8 M 3.)
90.28	Electrical or electronic instruments for measuring, checking and controlling.
85.19.10	Fuses for tension higher than 6,300 volts, remote control switches, thermic switches, thermo-magnetic switches, bronze socket, lightning arresters and switches (pentagonal and triangular) higher than 35 amperes.
85.19.10	Automatic switches.
90.26.10	Power supply meters. (For the manufacturers of automatic voltage regulators and control panels.)
98.05.90	Pastel colours for painting and educational use.
Items deleted from the quota list since they are produced by the Domestic Indusrry, and will no longer be imported.	
28.38.11	Copper sulphate (impure).
19	Copper sulphate (pure).
32.09.21, 29	Toxic paints, colour pastes and anti-corrosive paints.
82.05	Drill pins bigger than 10·5 mm. and up to 35 mm.
45.03	Bottle corks (of natural cork).
73.13	Pickled plates (except allocations of $1,000 each for importer and industrialist quotas under permission of the Ministry of Industry).
84.13	Liquid fuel burners up to 100 kg/per hour capacity.
Items transferred from quota list to liberalization list.	
31.02/03/04	Various chemical fertilizers.
31.05	Mixed fertilizers (with the permission of the Ministry of Agriculture).
32.13.10	Printing ink.
38.14	Anti-knock preparations used in mixing lubricants (for oil companies).
73.15	Alloy and high carbon steels (excluding those used in the manufacture of automobile springs).
90.14	Geodesy, topography land survey equipment.
90.17	Equipment and instruments for medical, surgery, dentistry and veterinary use.
90.20/30/90	X-ray tubes and accessories and X-ray machines.

A further announcement will be made when full details of the quotas and liberalization list become available.

Office of the British Trade Commissioner, Kenya

THE OFFICE address of the British Trade Commission has been changed and the new address is: 5th Floor, Shell House, Harambee Avenue, Nairobi, Kenya.

The telephone number is now Nairobi 28001-10. The box number and telegraphic address remain unchanged.

MISCELLANEOUS ADVERTISEMENTS

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BUYER WANTED for regular supply of trade-in Hydraulic trenchers, mainly good Whitlock or JCB machines, to be sold as purchased or overhauled and repainted. Box No. S6050, *Board of Trade Journal*, Room D94, Atlantic House, Holborn Viaduct, London, E.C.1.

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Index to statistics published regularly in the Board of Trade Journal

A = annually; M = monthly; Q = quarterly; 6-M = every six months.

Title	Last published
Balance of payments (Q)	8 Jan. 1965
Business names registered (A)	7 Feb. 1964
Capital expenditure:	
By industry – provisional (Q)	11 Dec. 1964
– final (Q)	This week
Distributive and service trades (A)	1 Jan. 1965
Expected capital expenditure (6-M)	16 Oct. 1964
Cars and commercial vehicles (M)	1 Jan. 1965
Catering trades turnover (M)	15 Jan. 1965
Chemical industries production (6-M)	30 Oct. 1964
Companies:	
Income and finance (Q)	6 Nov. 1964
New companies registered (M)	1 Jan. 1965
Property companies (A)	6 Nov. 1964
Engineering and electrical goods:	
Deliveries of certain products (Q)	1 Jan. 1965
Production, exports and orders (M)	1 Jan. 1965
Film industry:	
British film fund agency returns (M)	8 Jan. 1965
Cinema admissions and takings (M)	11 Dec. 1964
Overseas payments and earnings (A)	25 Sept. 1964
Registrations of films (A)	28 Feb. 1964
Trends in film-going (A)	25 Sept. 1964
Food consumption levels (A)	2 Oct. 1964
Foreign trade:	
Commonwealth trade (A)	30 Oct. 1964
Sterling area trade summary (Q)	6 Nov. 1964
Trends in exports of manufactures (A)	27 Nov. 1964
World trade and production (Q)	4 Dec. 1964
Foreign trade of the U.K.:	
Trade by air (6-M)	13 Nov. 1964
Unit value and volume index nos. (M)	8 Jan. 1965
Value of overseas trade (M)	1 Jan. 1965
Value of overseas trade (M) (provisional)	This week
Gold and dollar reserves (M)	8 Jan. 1965
Hire purchase:	
Assets and liabilities of HP companies (Q)	20 Nov. 1964
Business (M)	15 Jan. 1965
Industrial building:	
Provisional figures (Q)	30 Oct. 1964
Industrial production:	
Census, first results (A)	27 Dec. 1963
Index nos. (M)	25 Dec. 1964
N. Ireland index (M)	1 Jan. 1965
Insurance companies:	
Assets (A)	26 June 1964
Transactions (Q)	18 Dec. 1964
Investments and earnings overseas (6-M)	7 Aug. 1964
Pension funds:	
Assets (A)	10 July 1964
Transactions (Q)	27 Nov. 1964
Retail prices index (M)	25 Dec. 1964
Retail trade:	
Index nos. (M)	15 Jan. 1965
N. Ireland index (M)	15 Jan. 1965
Shipping movement at UK ports (Q)	1 Jan. 1965
Stocks:	
Manufacturers and distributors (Q)	This week
Retail (M)	This week
Textiles:	
Clothing and textile orders and deliveries (M)	18 Dec. 1964
Man-made fibres production (M)	15 Jan. 1965
Wholesale houses sales (M)	This week
Wool and cotton output (M)	This week
Tourism:	
International tourism (A)	28 Aug. 1964
UK tourist traffic (M)	1 Jan. 1965
Wholesale prices:	
Average prices of selected commodities (A)	21 Feb. 1964
Index nos. (M)	15 Jan. 1965

Board of Trade Departments, etc.

Subject	Last published
Board of Trade Addresses	28 Feb. 1964
Board of Trade Regional Organization	1 Jan. 1965
British and Commonwealth Chambers of Commerce and other British Business Organizations Overseas	25 Sept. 1964
British Commercial Representatives Overseas	6 Nov. 1964
Directory of Board of Trade Departments and their work	14 Aug. 1964
ECGD Local Offices	4 Dec. 1964
Official Receivers' Offices	24 July 1964
United States Consular Offices in the UK	14 Aug. 1964

Registered as a Newspaper. Published by Her Majesty's Stationery Office, Atlantic House, Holborn Viaduct, London, E.C.1, for the Board of Trade, 1 Victoria Street, London, S.W.1.
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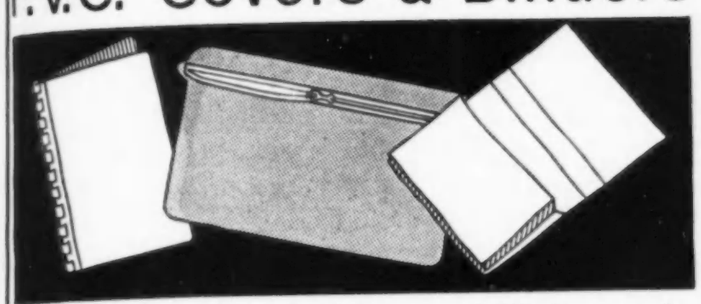

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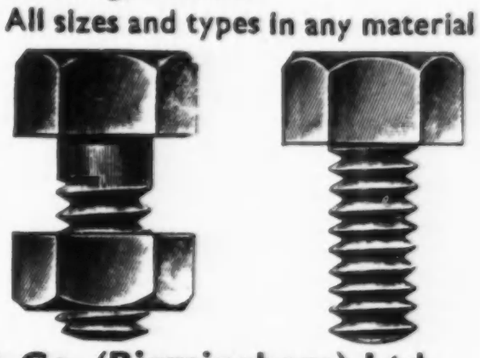

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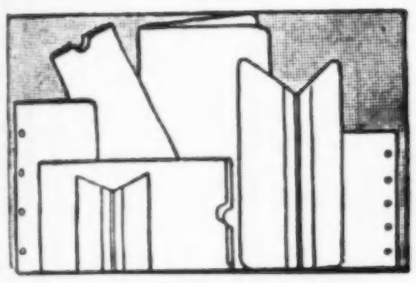

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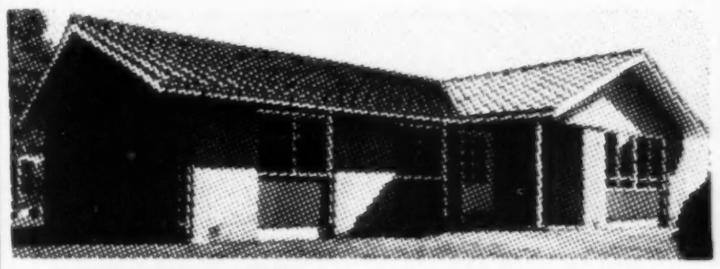

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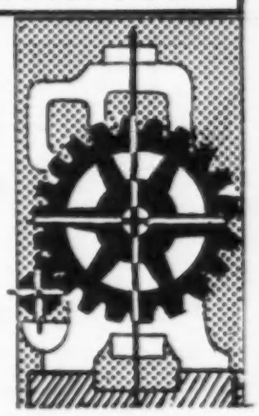

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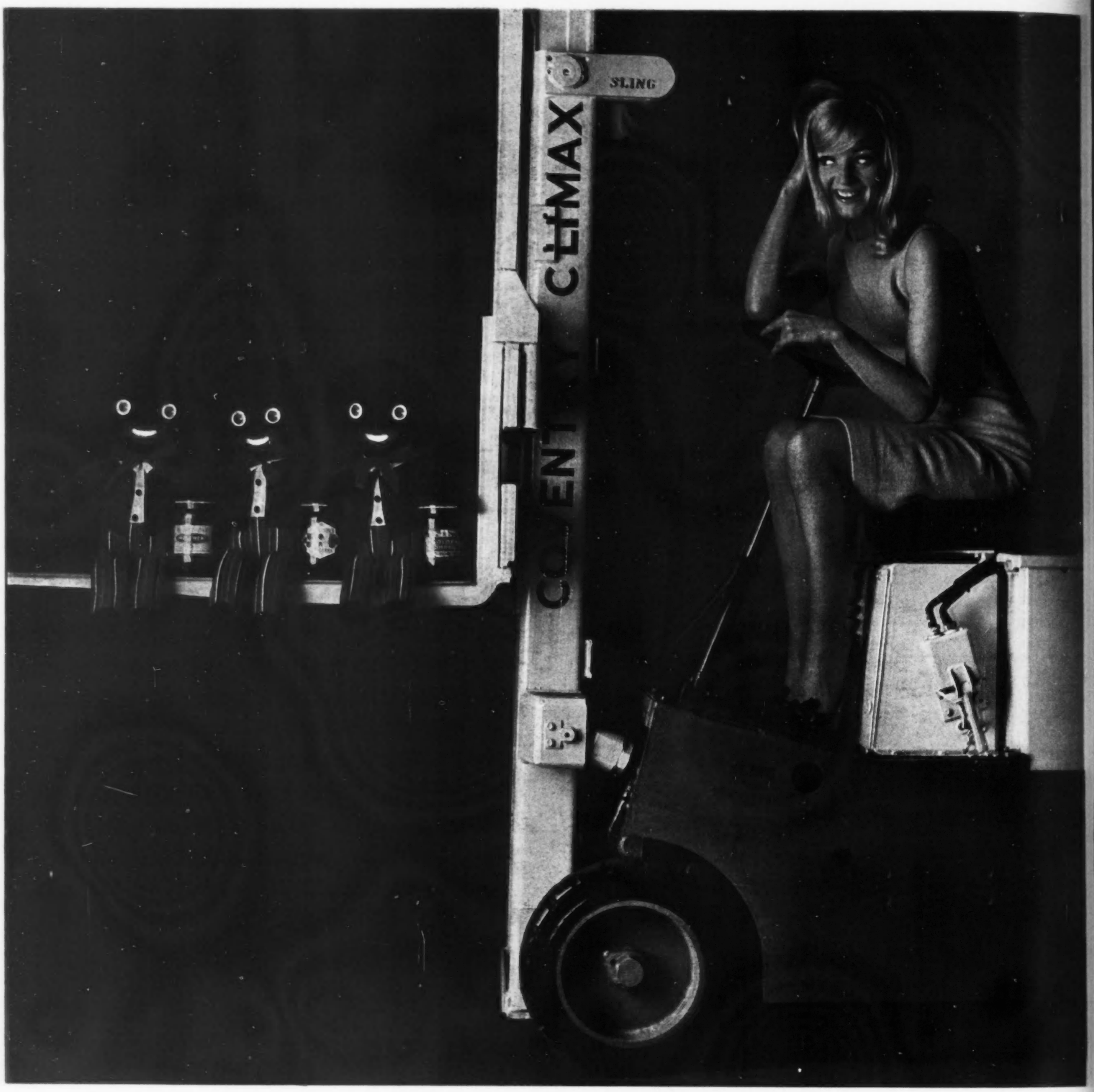

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